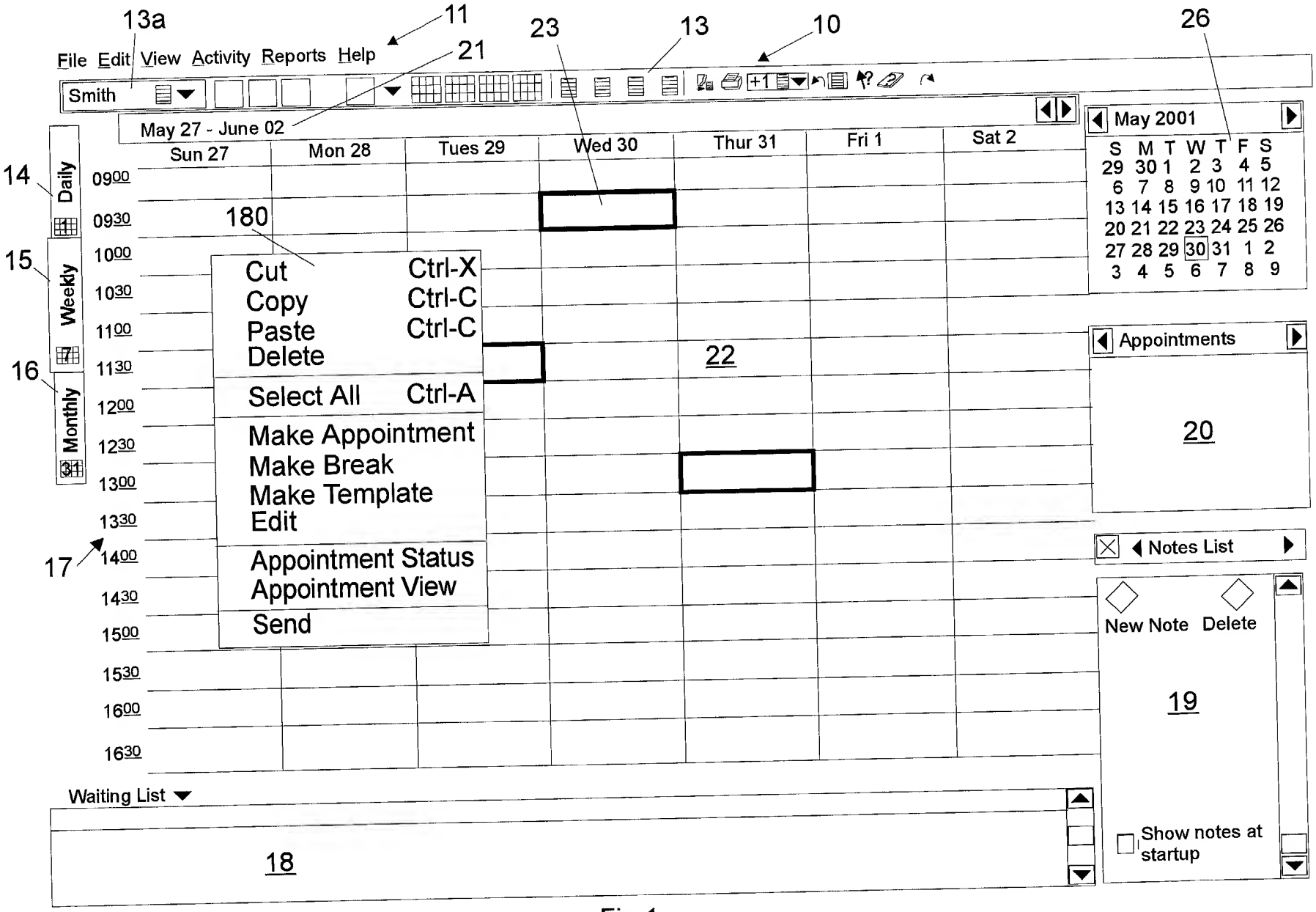
13a
11
23
13
10
26
21
File Edit View Activity Reports Help
Smith
May 27 - June 02
Sun 27
Mon 28
Tues 29
Wed 30
Thur 31
Fri 1
Sat 2
May 2001
S M T W T F S
29 30 1 2 3 4 5
6 7 8 9 10 11 12
13 14 15 16 17 18 19
20 21 22 23 24 25 26
27 28 29 30 31 1 2
3 4 5 6 7 8 9
14
Daily
15
Weekly
16
Monthly
17
0900
0930
1000
1030
1100
1130
1200
1230
1300
1330
1400
1430
1500
1530
1600
1630
180
Cut Ctrl-X
Copy Ctrl-C
Paste Ctrl-C
Delete
Select All Ctrl-A
Make Appointment
Make Break
Make Template
Edit
Appointment Status
Appointment View
Send
22
Appointments
20
Notes List
New Note
Delete
19
Show notes at startup
Waiting List
18

Fig 1.

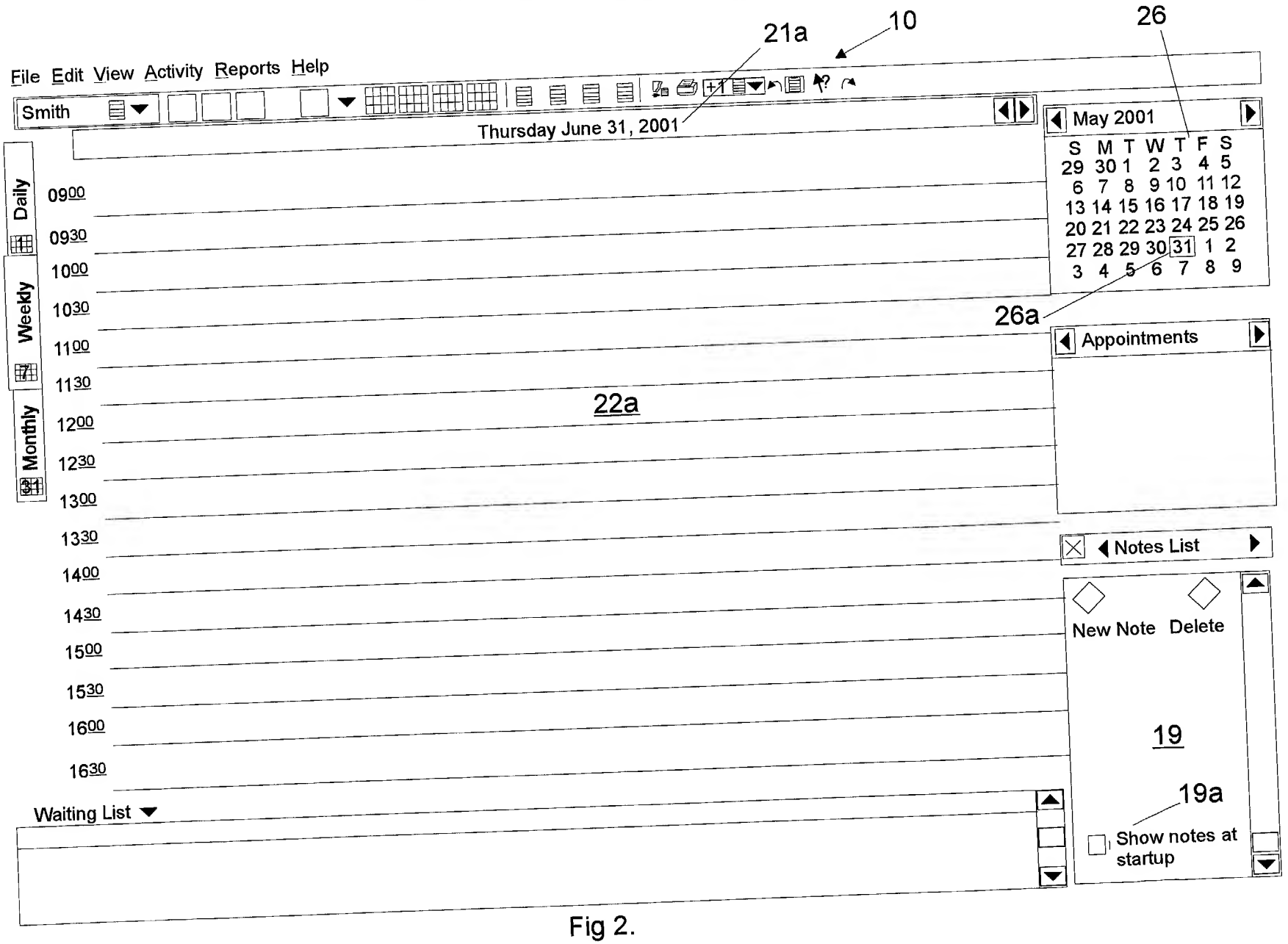
21a
10
26
File Edit View Activity Reports Help
Smith
Thursday June 31, 2001
May 2001
S M T W T F S
29 30 1 2 3 4 5
6 7 8 9 10 11 12
13 14 15 16 17 18 19
20 21 22 23 24 25 26
27 28 29 30 31 1 2
3 4 5 6 7 8 9
26a
Daily
Weekly
Monthly
0900
0930
1000
1030
1100
1130
22a
1200
1230
1300
1330
1400
1430
1500
1530
1600
1630
Appointments
Notes List
New Note
Delete
19
19a
Show notes at startup
Waiting List

Fig 2.

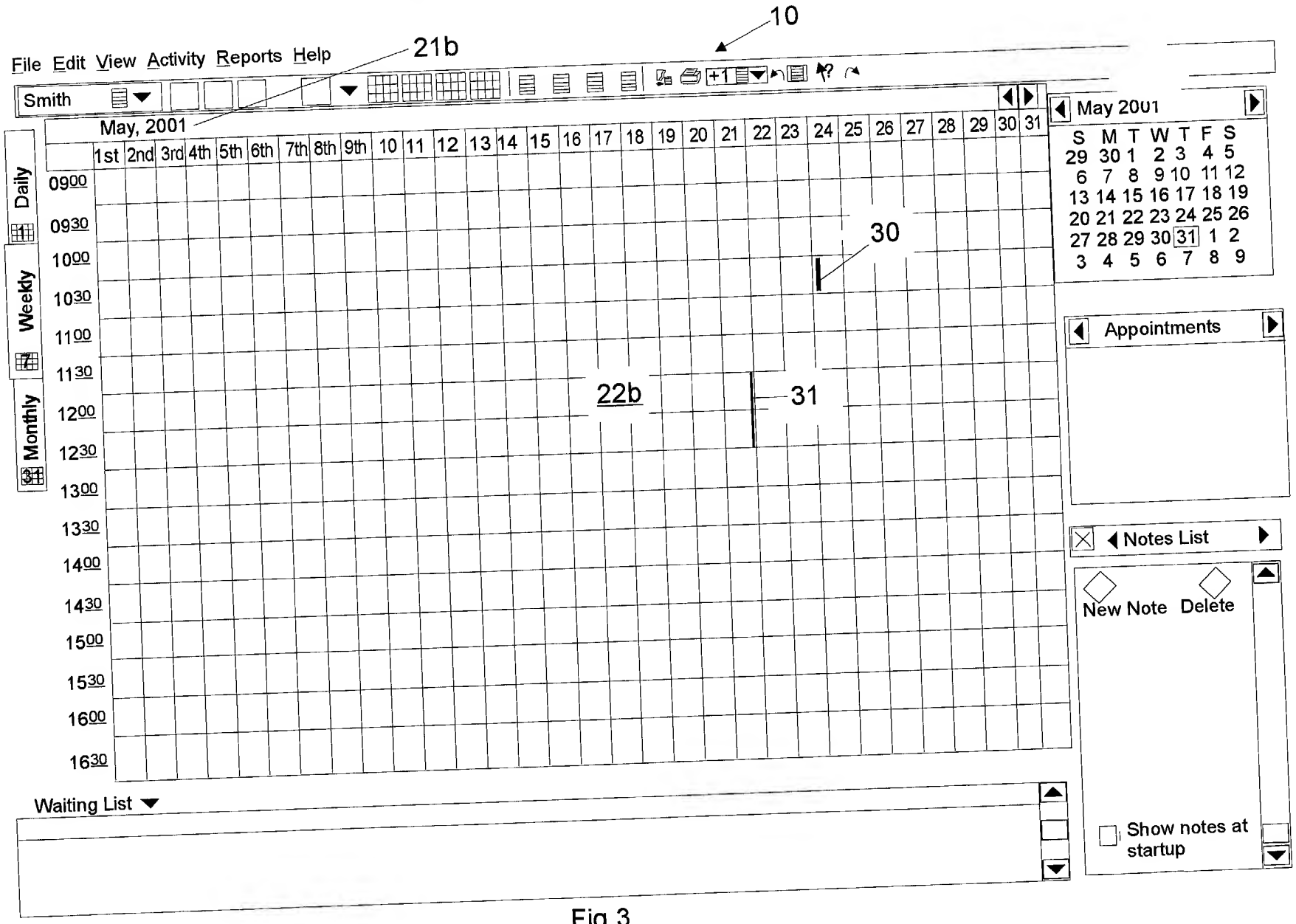
10
21b
File Edit View Activity Reports Help
Smith
May, 2001
1st 2nd 3rd 4th 5th 6th 7th 8th 9th 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31
0900 0930 1000 1030 1100 1130 1200 1230 1300 1330 1400 1430 1500 1530 1600 1630
Daily
Weekly
Monthly
30
22b
31
May 2001
S M T W T F S
29 30 1 2 3 4 5
6 7 8 9 10 11 12
13 14 15 16 17 18 19
20 21 22 23 24 25 26
27 28 29 30 31 1 2
3 4 5 6 7 8 9
Appointments
Notes List
New Note
Delete
Show notes at startup
Waiting List

Fig 3.

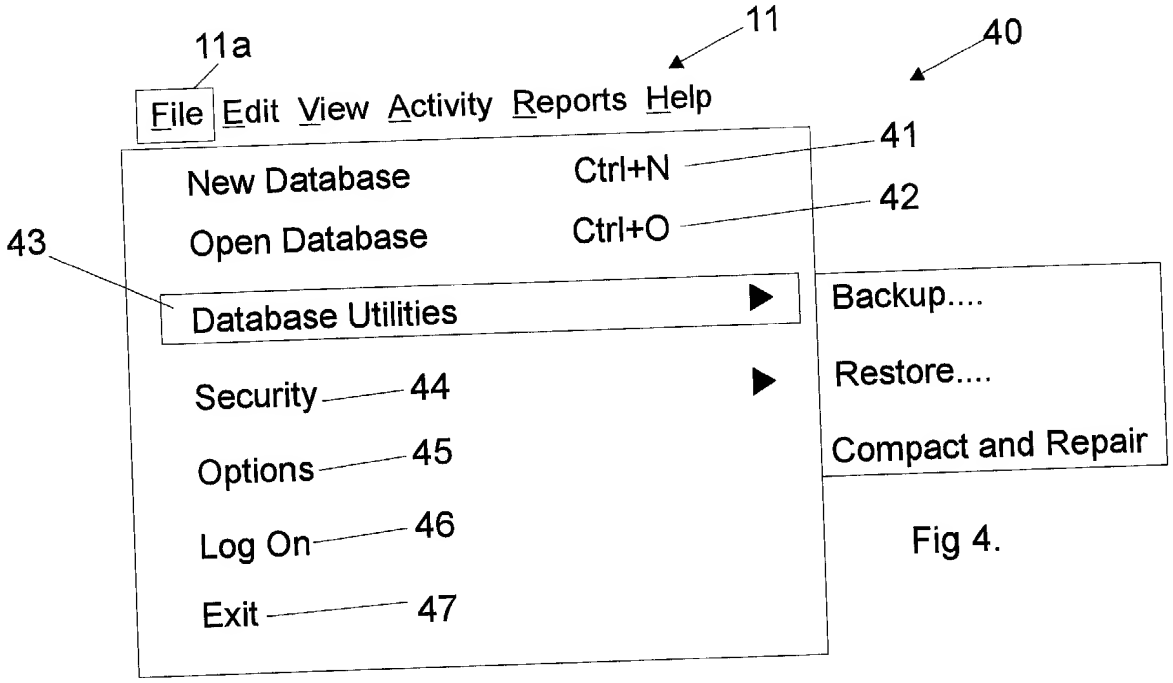
11a
11
40
File Edit View Activity Reports Help
New Database Ctrl+N
Open Database Ctrl+O
Database Utilities
Security
Options
Log On
Exit
41
42
43
44
45
46
47
Backup....
Restore....
Compact and Repair

Fig 4.

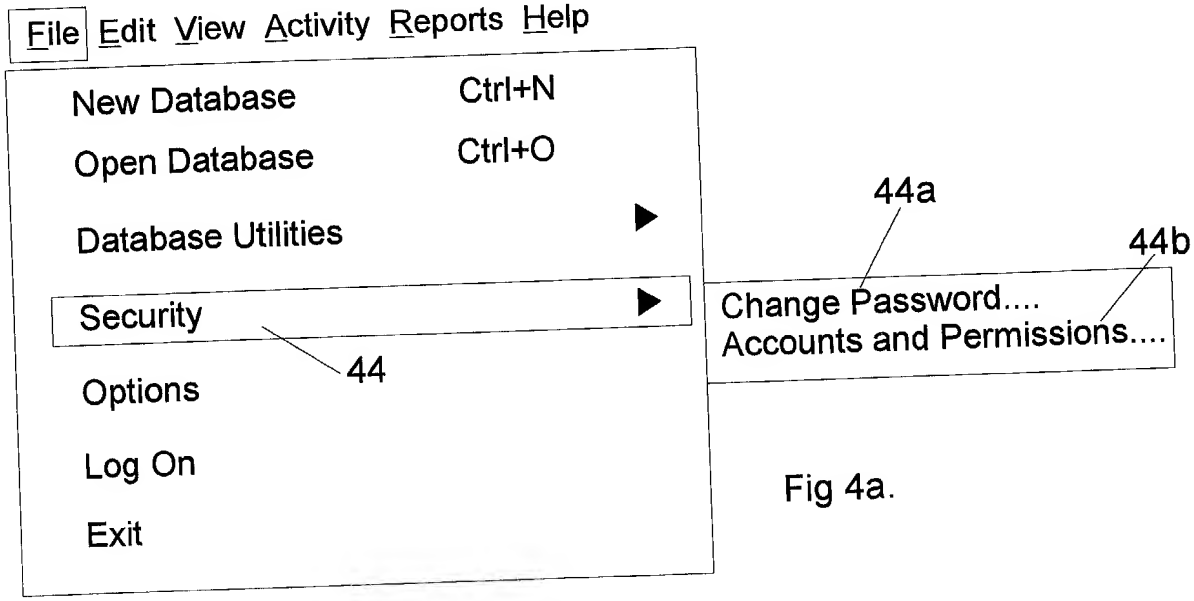
File Edit View Activity Reports Help
New Database Ctrl+N
Open Database Ctrl+O
Database Utilities
Security
Options
Log On
Exit
44
44a
44b
Change Password....
Accounts and Permissions....

Fig 4a.

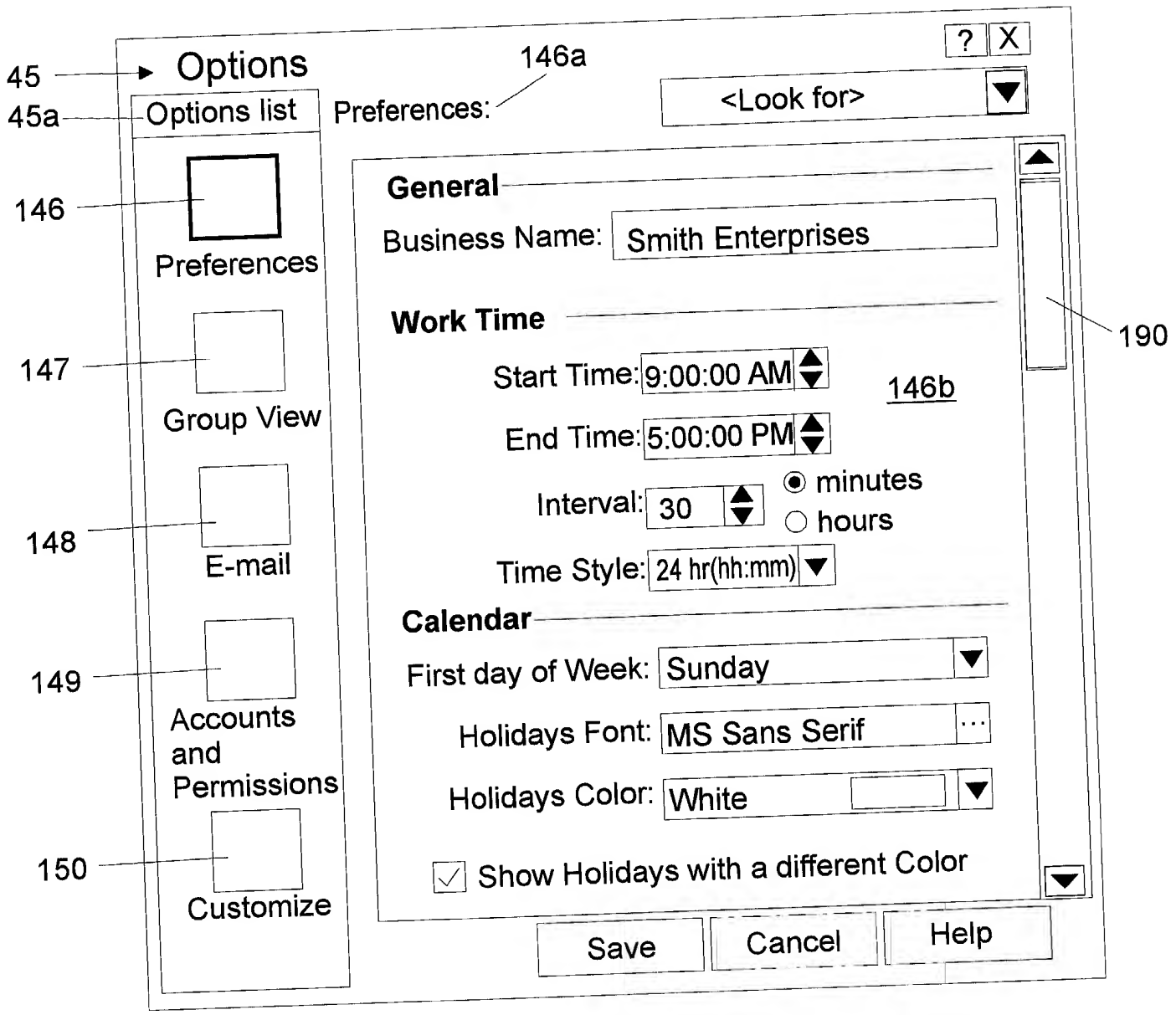
45
Options
45a
Options list
146a
Preferences:
<Look for>
?
X
146
Preferences
147
Group View
148
E-mail
149
Accounts and Permissions
150
Customize
General
Business Name:
Smith Enterprises
Work Time
Start Time:
9:00:00 AM
146b
End Time:
5:00:00 PM
Interval:
30
minutes
hours
Time Style:
24 hr(hh:mm)
Calendar
First day of Week:
Sunday
Holidays Font:
MS Sans Serif
Holidays Color:
White
Show Holidays with a different Color
190
Save
Cancel
Help

Fig 5.

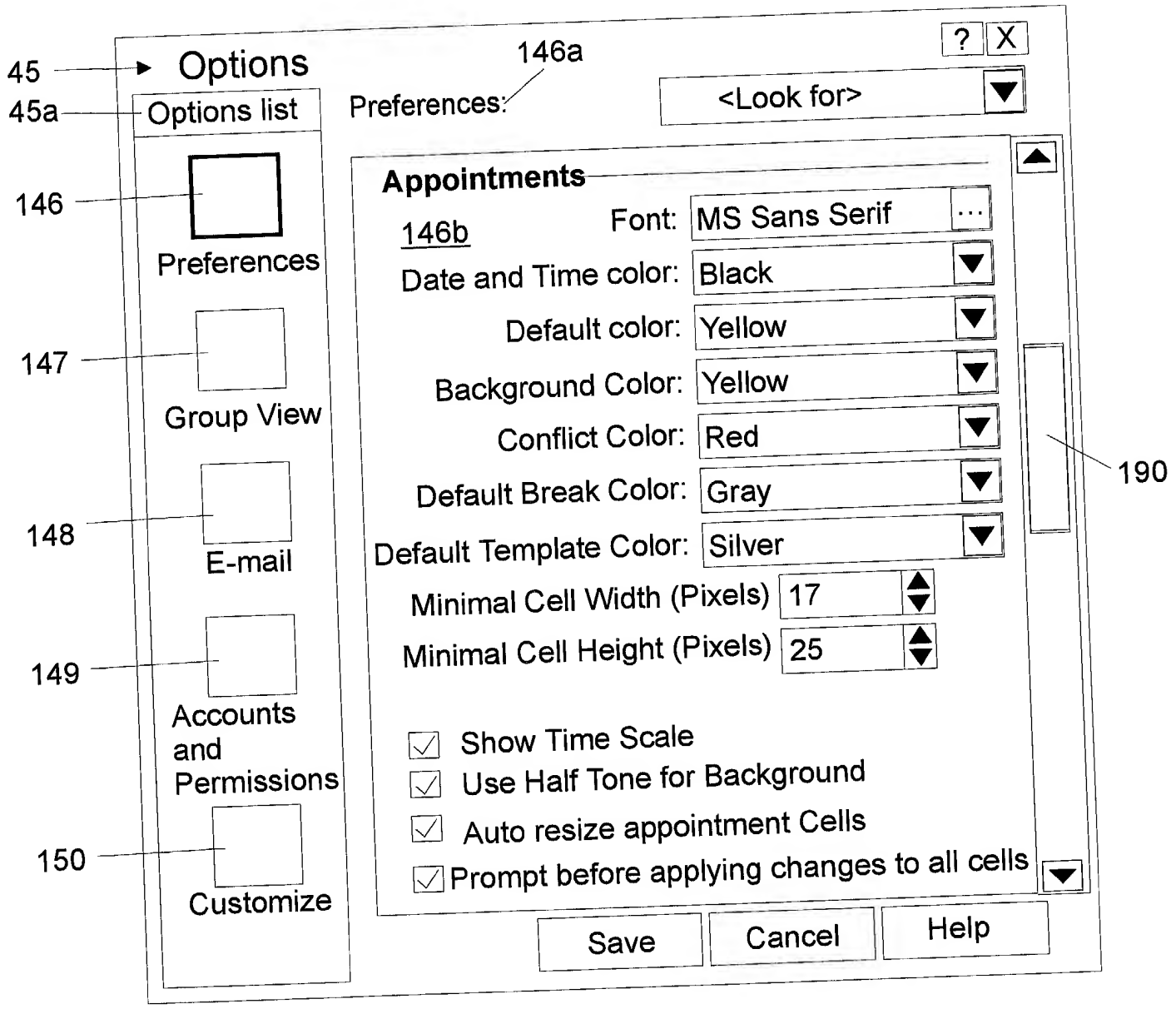
45
Options
45a
Options list
146a
Preferences:
<Look for>
?
X
146
Preferences
147
Group View
148
E-mail
149
Accounts and Permissions
150
Customize
Appointments
146b
Font: MS Sans Serif
Date and Time color: Black
Default color: Yellow
Background Color: Yellow
Conflict Color: Red
Default Break Color: Gray
Default Template Color: Silver
Minimal Cell Width (Pixels) 17
Minimal Cell Height (Pixels) 25
Show Time Scale
Use Half Tone for Background
Auto resize appointment Cells
Prompt before applying changes to all cells
190
Save
Cancel
Help

Fig 6.

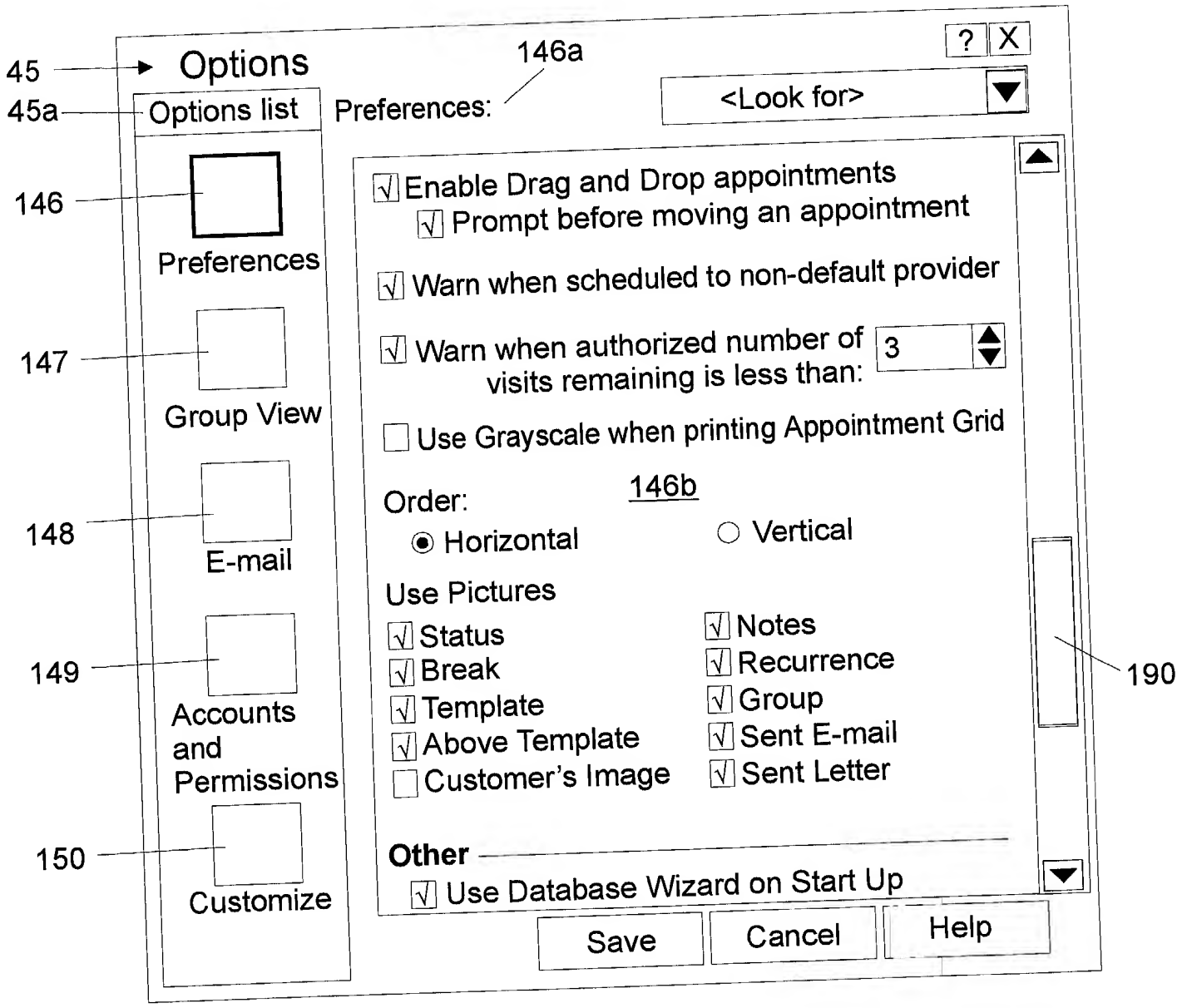
45
Options
45a
Options list
146a
Preferences:
<Look for>
146
Preferences
147
Group View
148
E-mail
149
Accounts and Permissions
150
Customize
Enable Drag and Drop appointments
Prompt before moving an appointment
Warn when scheduled to non-default provider
Warn when authorized number of visits remaining is less than:
3
Use Grayscale when printing Appointment Grid
Order:
146b
Horizontal
Vertical
Use Pictures
Status
Break
Template
Above Template
Customer's Image
Notes
Recurrence
Group
Sent E-mail
Sent Letter
Other
Use Database Wizard on Start Up
Save
Cancel
Help
190

Fig 7.

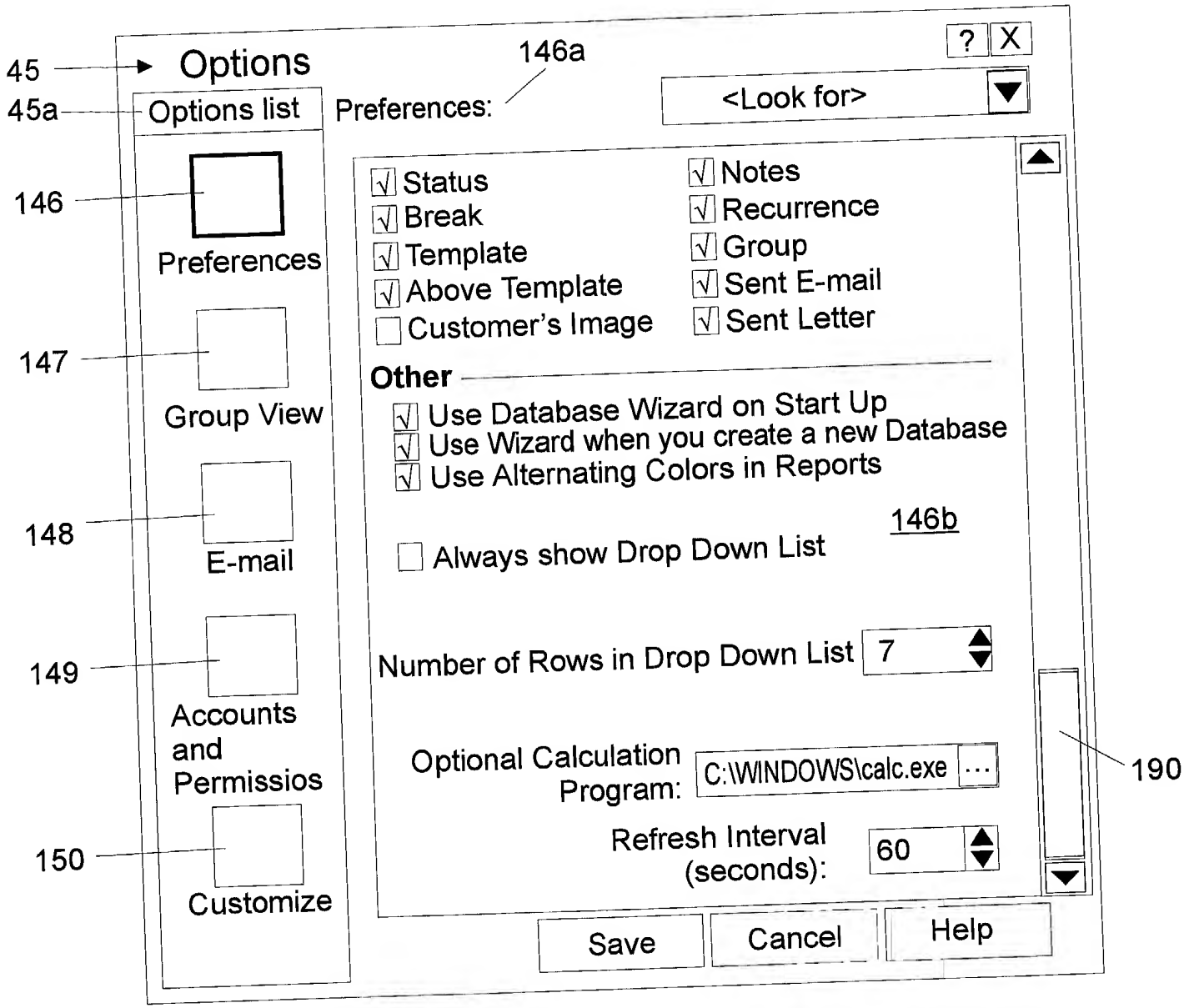
45
Options
45a
Options list
146a
Preferences:
<Look for>
?
X
146
Preferences
147
Group View
148
E-mail
149
Accounts and Permissios
150
Customize
Status
Break
Template
Above Template
Customer's Image
Notes
Recurrence
Group
Sent E-mail
Sent Letter
Other
Use Database Wizard on Start Up
Use Wizard when you create a new Database
Use Alternating Colors in Reports
146b
Always show Drop Down List
Number of Rows in Drop Down List
7
Optional Calculation Program:
C:\WINDOWS\calc.exe
...
Refresh Interval (seconds):
60
190
Save
Cancel
Help

Fig 8.

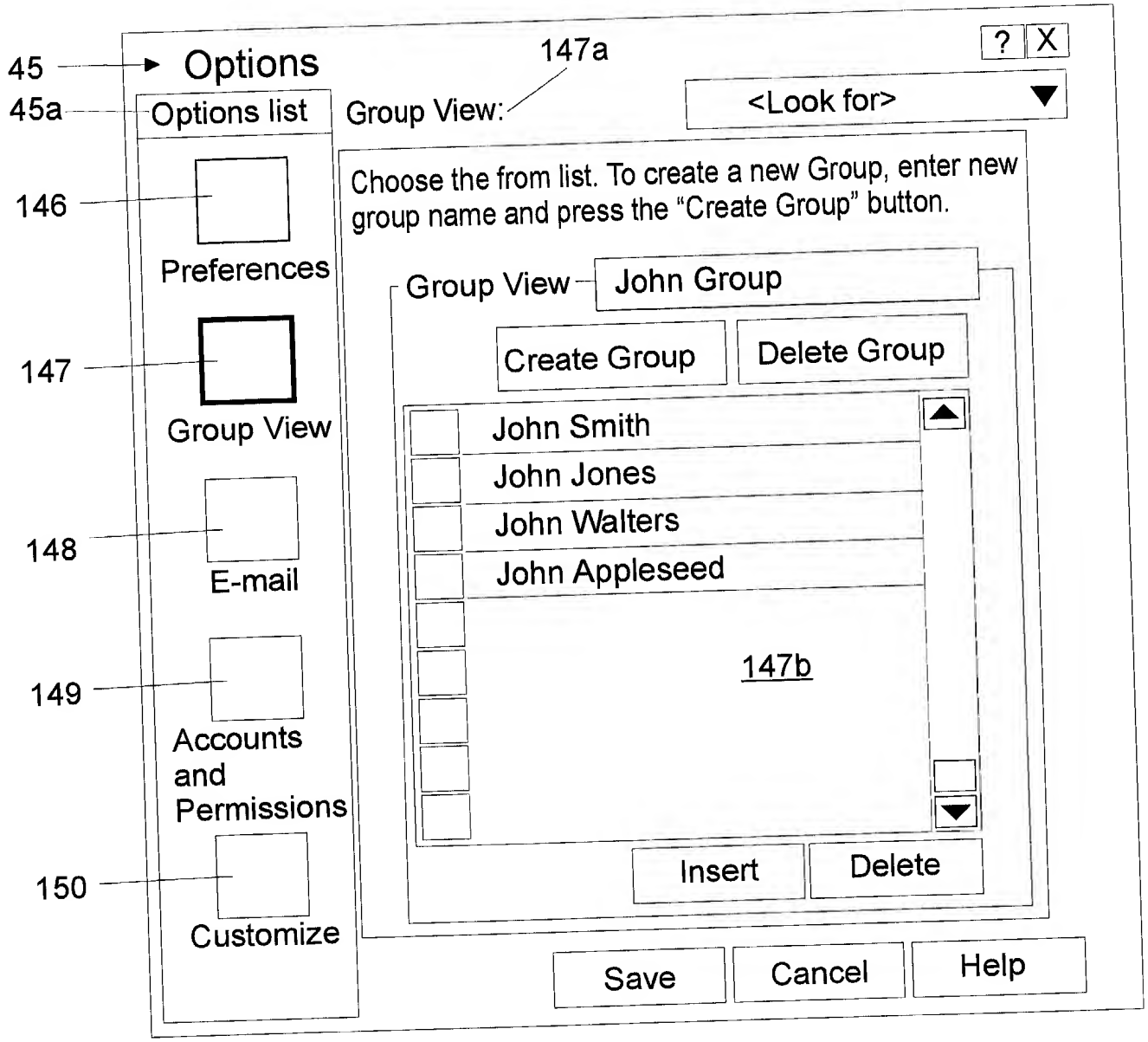
45
Options
45a
Options list
147a
Group View:
?
X
<Look for>
146
Preferences
Choose the from list. To create a new Group, enter new group name and press the "Create Group" button.
147
Group View
Group View
John Group
Create Group
Delete Group
John Smith
John Jones
John Walters
John Appleseed
148
E-mail
147b
149
Accounts and Permissions
Insert
Delete
150
Customize
Save
Cancel
Help

Fig 9.

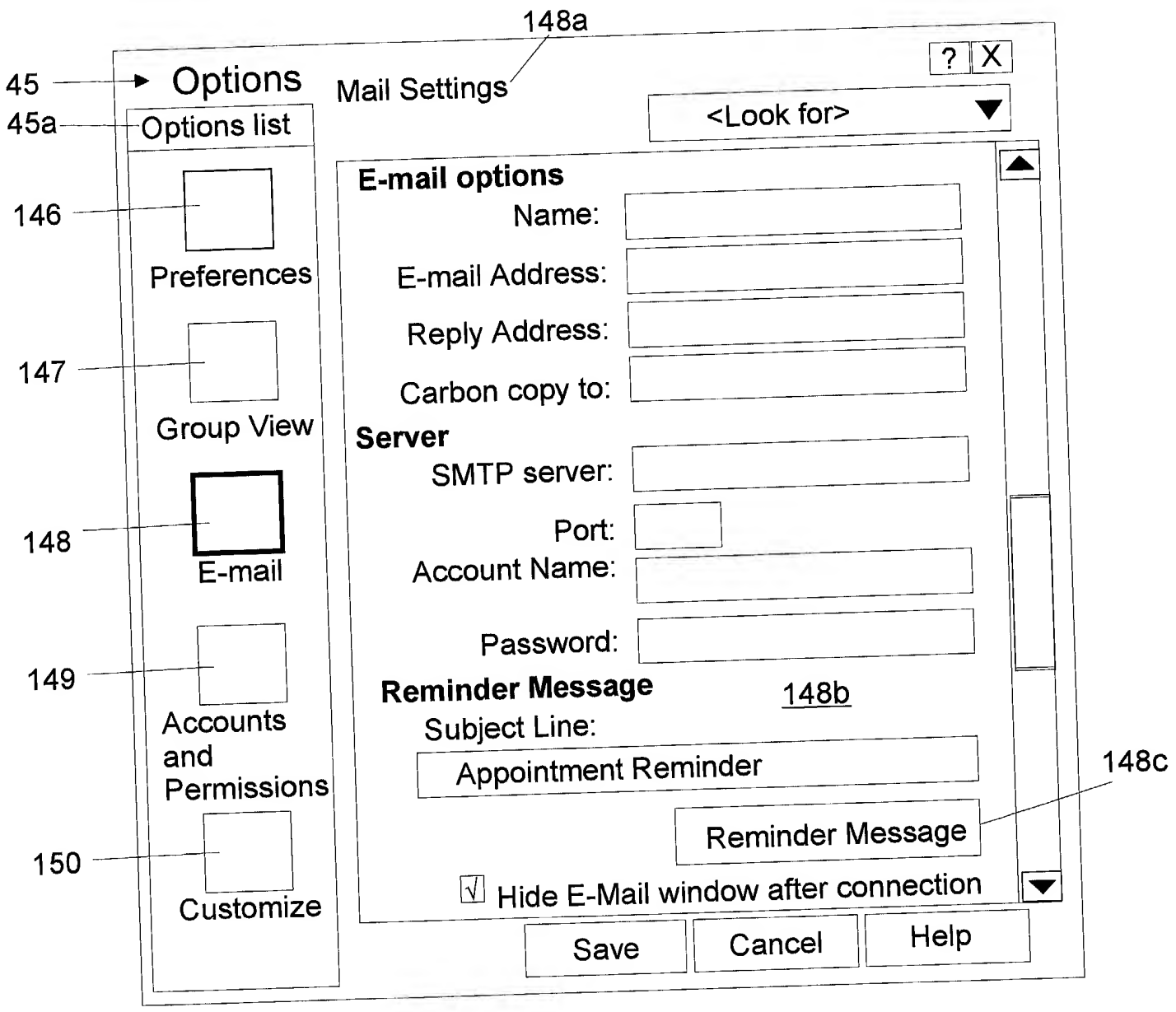
148a
45
Options
Mail Settings
?
X
45a
Options list
<Look for>
E-mail options
146
Name:
Preferences
E-mail Address:
Reply Address:
147
Carbon copy to:
Group View
Server
SMTP server:
148
Port:
E-mail
Account Name:
Password:
149
Reminder Message
148b
Accounts
and
Permissions
Subject Line:
Appointment Reminder
148c
Reminder Message
150
Hide E-Mail window after connection
Customize
Save
Cancel
Help

Fig 10.

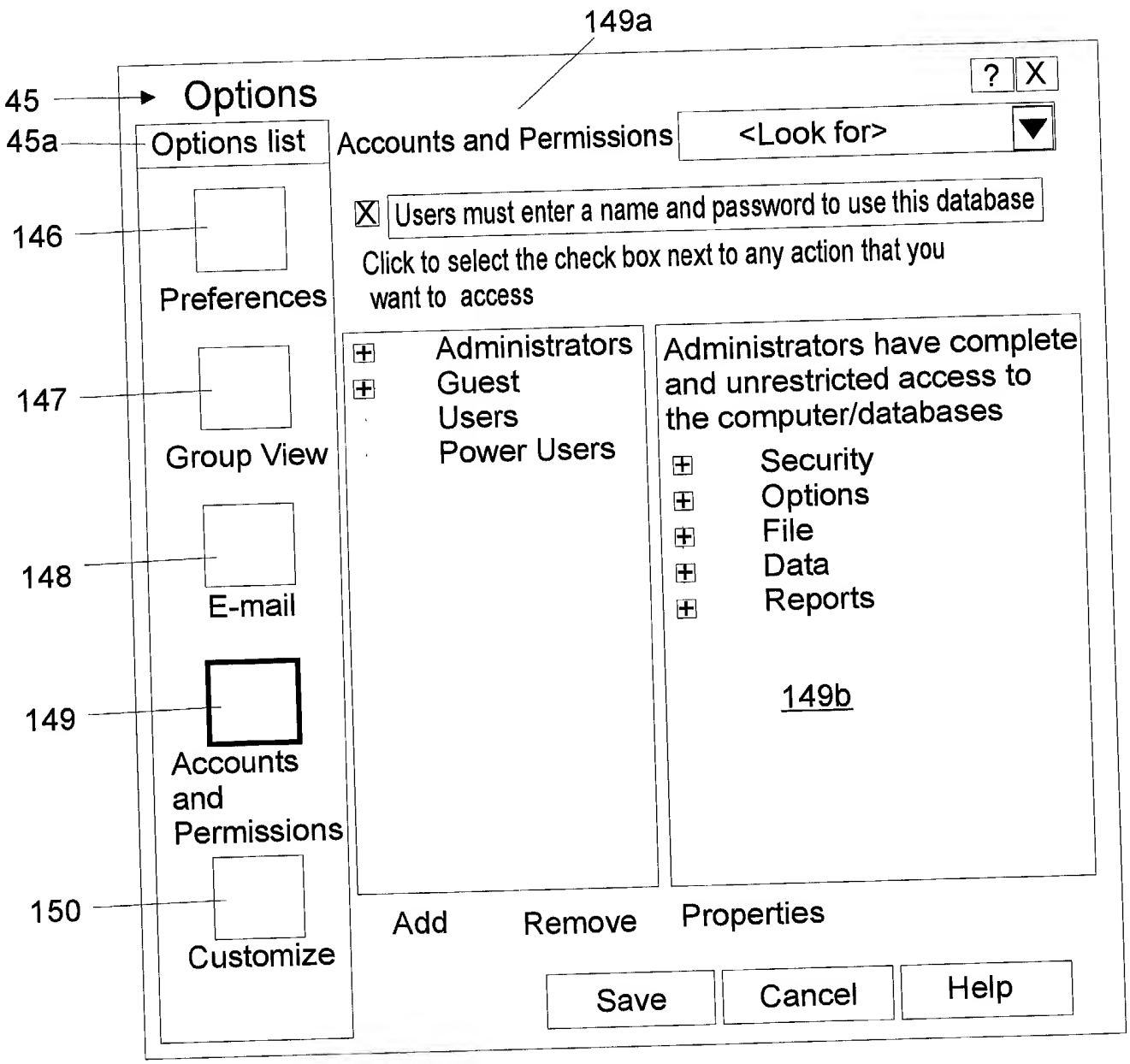
149a
45
Options
?
X
45a
Options list
Accounts and Permissions
<Look for>
146
Preferences
X
Users must enter a name and password to use this database
Click to select the check box next to any action that you want to access
147
Group View
Administrators
Guest
Users
Power Users
Administrators have complete and unrestricted access to the computer/databases
148
E-mail
Security
Options
File
Data
Reports
149
149b
Accounts and Permissions
150
Customize
Add
Remove
Properties
Save
Cancel
Help

Fig 11.

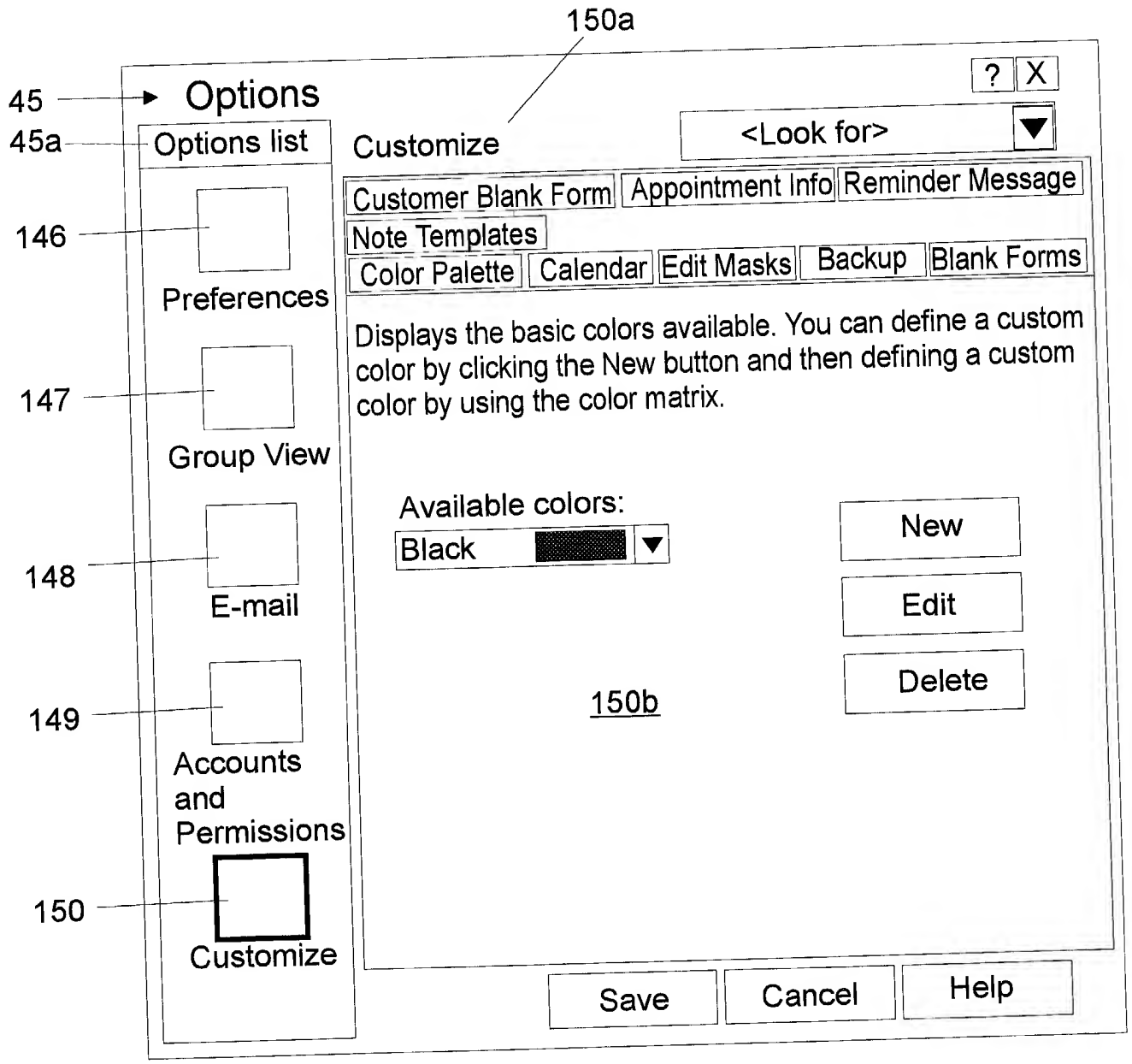
150a
45
Options
45a
Options list
?
X
Customize
<Look for>
Customer Blank Form
Appointment Info
Reminder Message
Note Templates
Color Palette
Calendar
Edit Masks
Backup
Blank Forms
146
Preferences
147
Group View
Displays the basic colors available. You can define a custom color by clicking the New button and then defining a custom color by using the color matrix.
Available colors:
Black
New
148
E-mail
Edit
Delete
149
150b
Accounts and Permissions
150
Customize
Save
Cancel
Help

Fig 12.

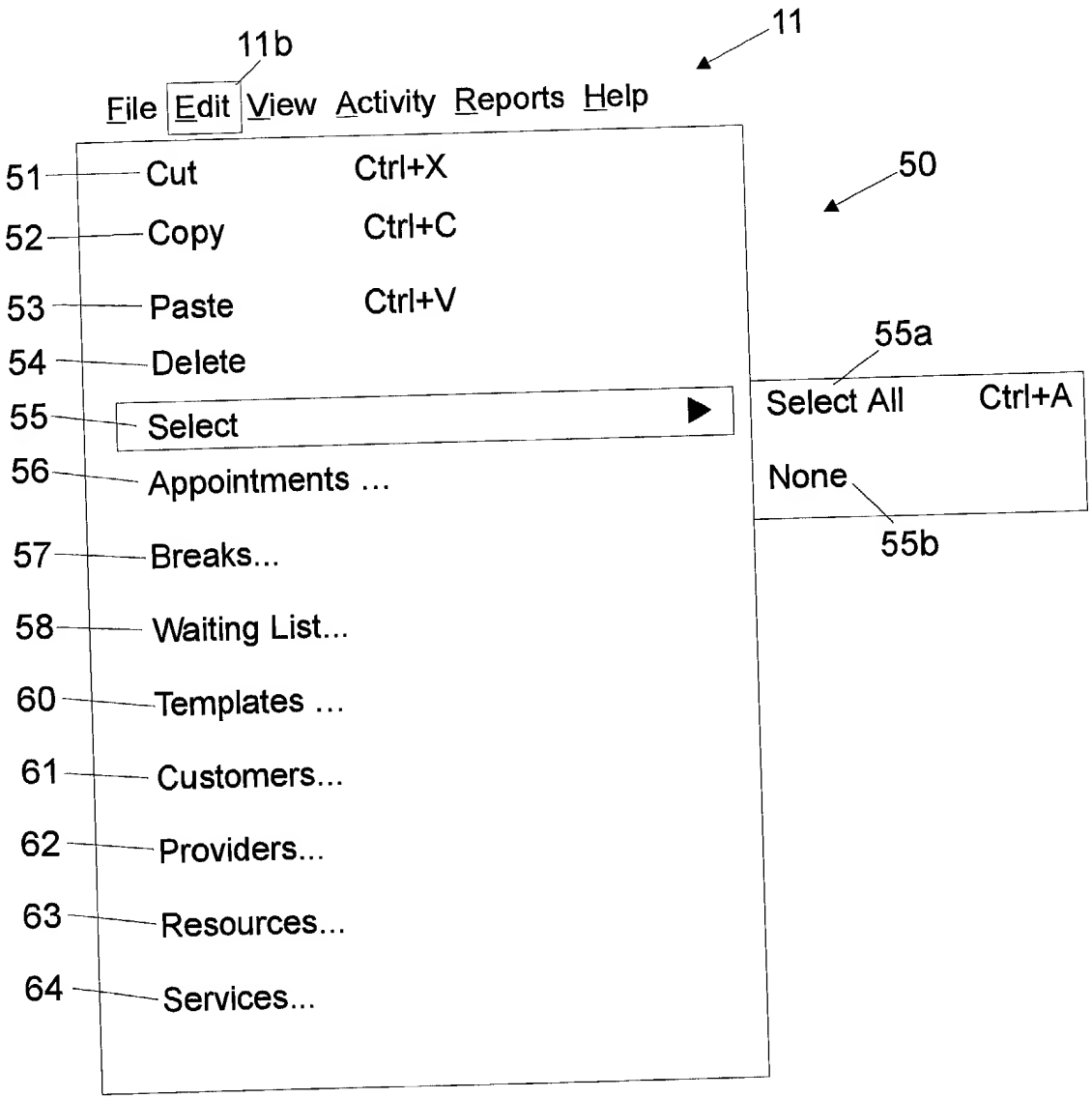
11
11b
File
Edit
View
Activity
Reports
Help
50
51
Cut
Ctrl+X
52
Copy
Ctrl+C
53
Paste
Ctrl+V
54
Delete
55
Select
55a
Select All
Ctrl+A
None
55b
56
Appointments ...
57
Breaks...
58
Waiting List...
60
Templates ...
61
Customers...
62
Providers...
63
Resources...
64
Services...

Fig 13.

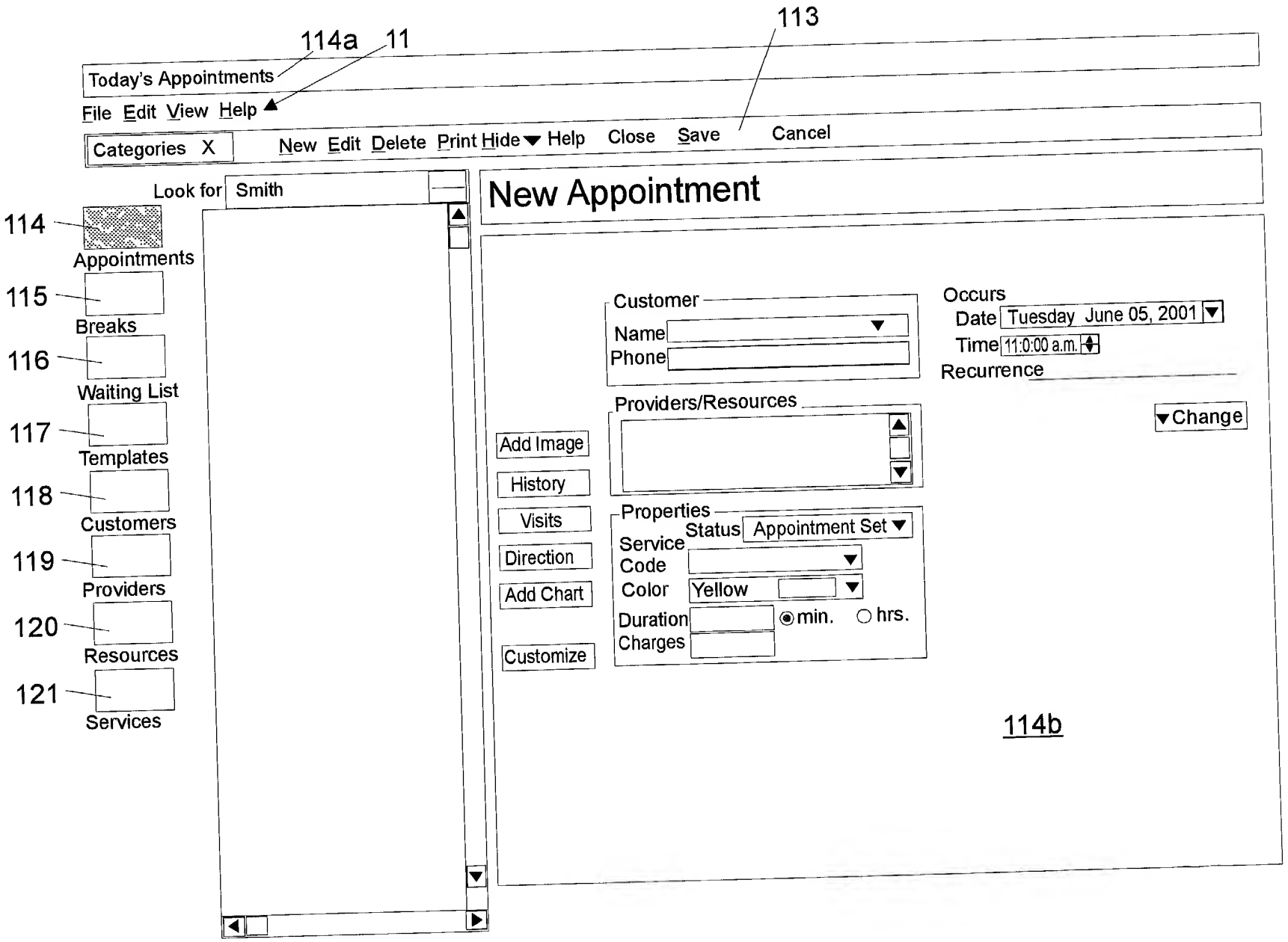
113
114a
11
Today's Appointments
File Edit View Help
Categories X
New Edit Delete Print Hide Help Close Save Cancel
Look for Smith
New Appointment
114
Appointments
115
Breaks
116
Waiting List
117
Templates
118
Customers
119
Providers
120
Resources
121
Services
Customer
Name
Phone
Occurs
Date Tuesday June 05, 2001
Time 11:0:00 a.m.
Recurrence
Change
Providers/Resources
Add Image
History
Visits
Direction
Add Chart
Customize
Properties
Status Appointment Set
Service Code
Color Yellow
Duration
min.
hrs.
Charges
114b

Fig 14.

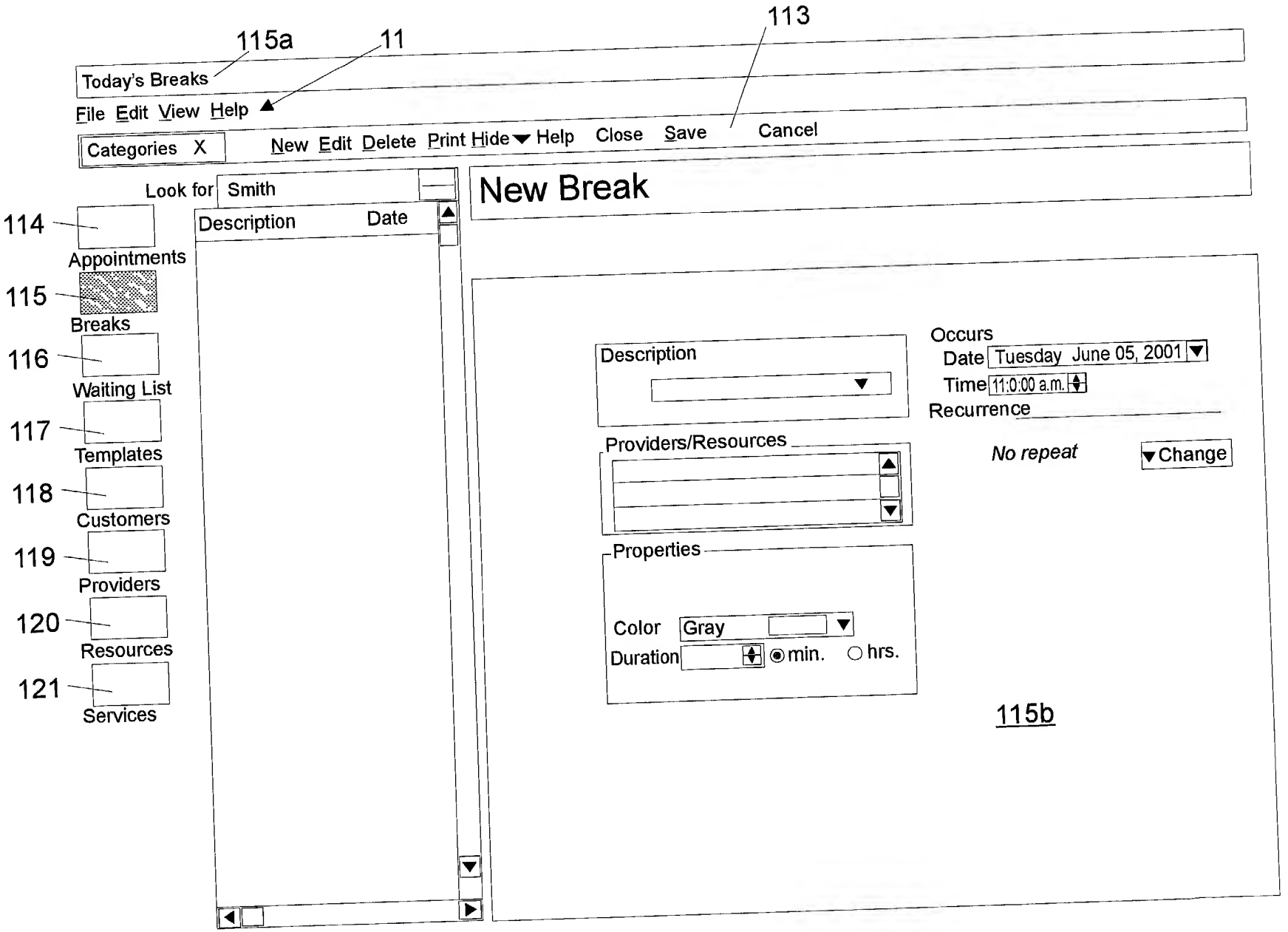
115a
11
113
Today's Breaks
File Edit View Help
Categories X
New Edit Delete Print Hide Help Close Save Cancel
Look for Smith
Description Date
New Break
114
Appointments
115
Breaks
116
Waiting List
117
Templates
118
Customers
119
Providers
120
Resources
121
Services
Description
Occurs
Date Tuesday June 05, 2001
Time 11:0:00 a.m.
Recurrence
No repeat
Change
Providers/Resources
Properties
Color Gray
Duration min. hrs.
115b

Fig 15.

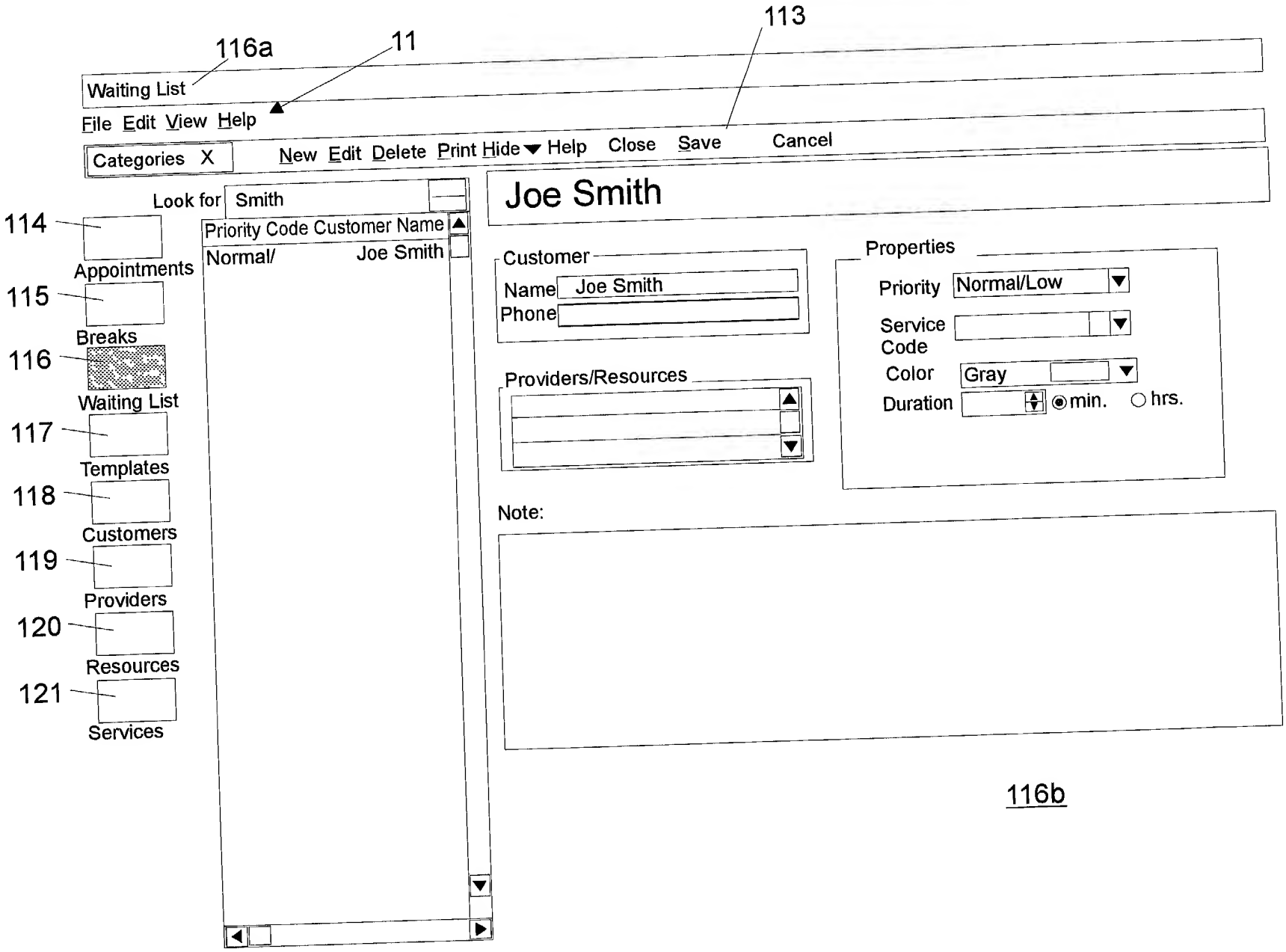
116a
11
113
Waiting List
File Edit View Help
Categories X
New Edit Delete Print Hide Help Close Save Cancel
Look for Smith
Priority Code Customer Name
Normal/ Joe Smith
Joe Smith
Customer
Name Joe Smith
Phone
Properties
Priority Normal/Low
Service Code
Color Gray
Duration min. hrs.
Providers/Resources
Note:
114
Appointments
115
Breaks
116
Waiting List
117
Templates
118
Customers
119
Providers
120
Resources
121
Services
116b

Fig 16.

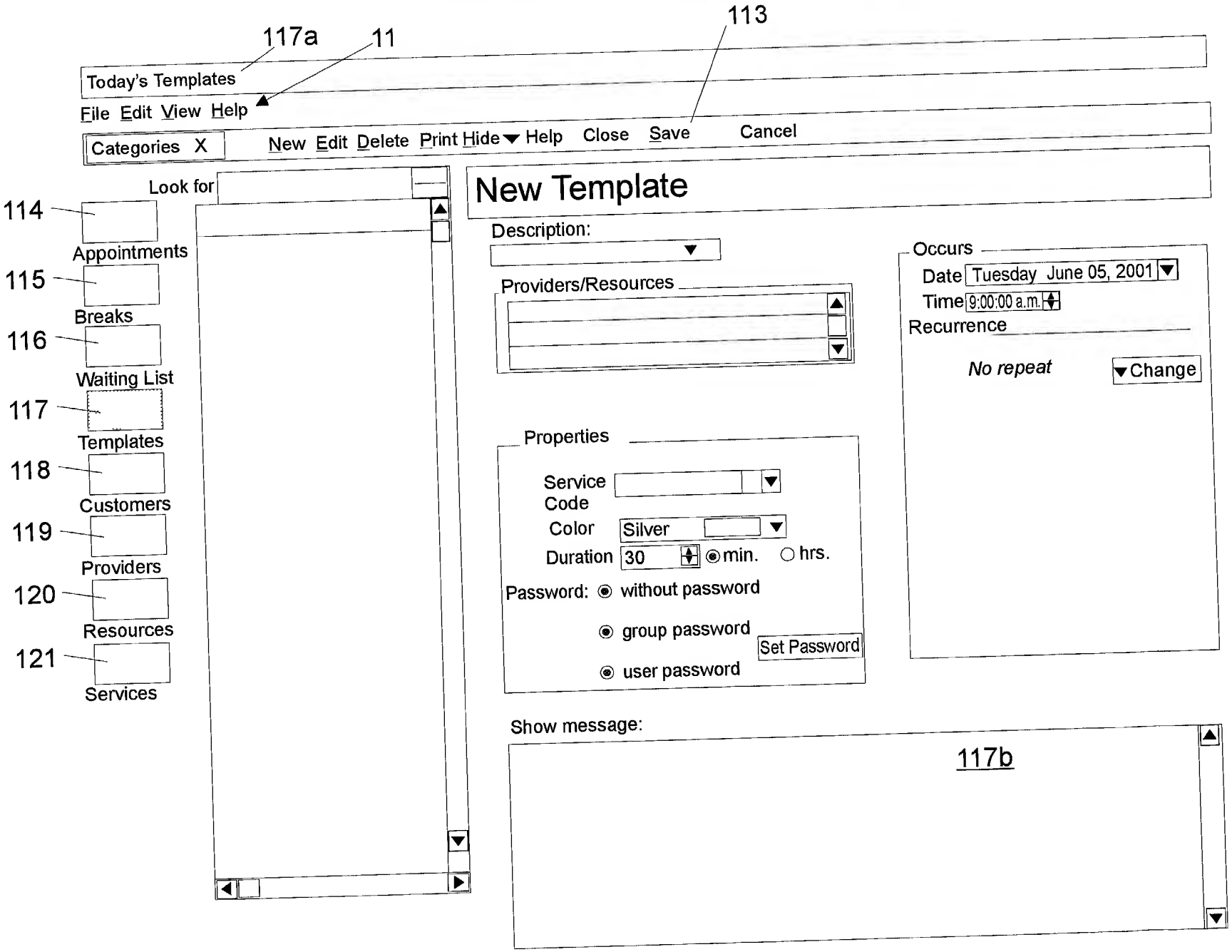
117a
11
113
Today's Templates
File Edit View Help
Categories X
New Edit Delete Print Hide Help Close Save Cancel
Look for
114
Appointments
115
Breaks
116
Waiting List
117
Templates
118
Customers
119
Providers
120
Resources
121
Services
New Template
Description:
Providers/Resources
Occurs
Date Tuesday June 05, 2001
Time 9:00:00 a.m.
Recurrence
No repeat
Change
Properties
Service Code
Color Silver
Duration 30 min. hrs.
Password: without password
group password
user password
Set Password
Show message:
117b

Fig 17.

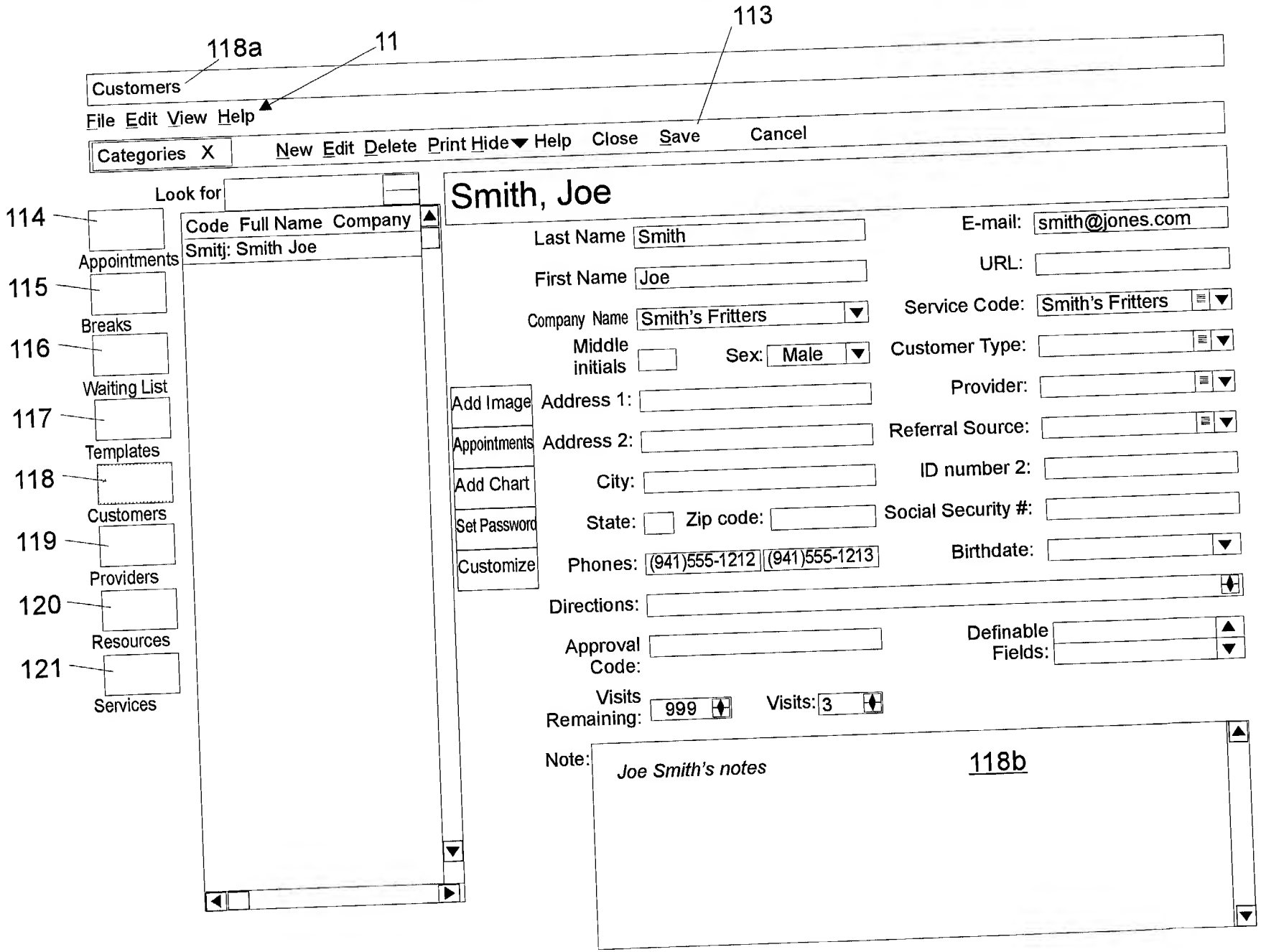
113
118a
11
Customers
File Edit View Help
Categories X
New Edit Delete Print Hide Help Close Save Cancel
Look for
Code Full Name Company
Smitj: Smith Joe
Smith, Joe
114
Appointments
115
Breaks
116
Waiting List
117
Templates
118
Customers
119
Providers
120
Resources
121
Services
Add Image
Appointments
Add Chart
Set Password
Customize
Last Name Smith
First Name Joe
Company Name Smith's Fritters
Middle initials
Sex: Male
Address 1:
Address 2:
City:
State:
Zip code:
Phones: (941)555-1212 (941)555-1213
Directions:
Approval Code:
Visits Remaining: 999
Visits: 3
Note: Joe Smith's notes
118b
E-mail: smith@jones.com
URL:
Service Code: Smith's Fritters
Customer Type:
Provider:
Referral Source:
ID number 2:
Social Security #:
Birthdate:
Definable Fields:

Fig 18.

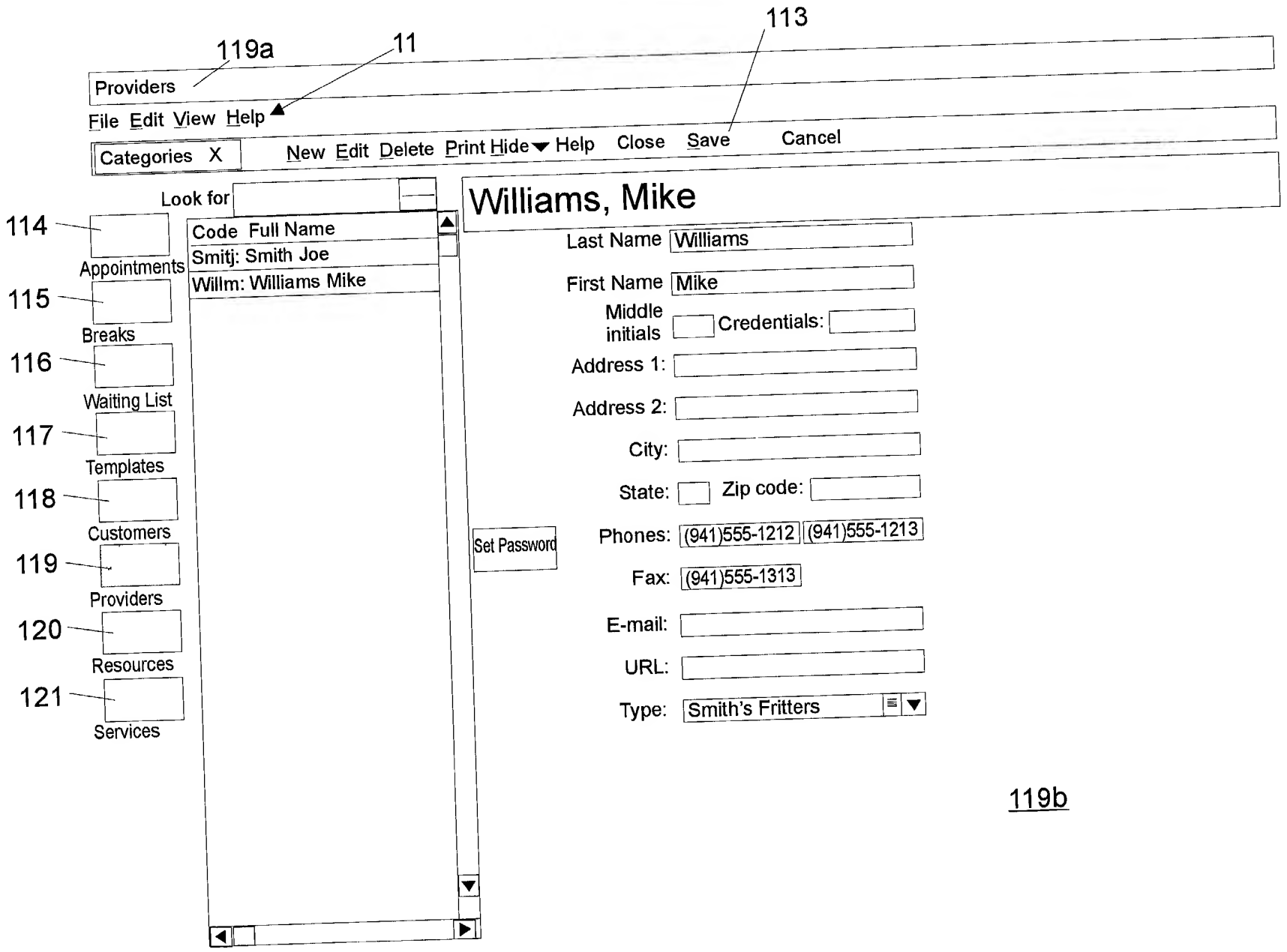
119a
11
113
Providers
File Edit View Help
Categories X
New Edit Delete Print Hide Help Close Save Cancel
Look for
Williams, Mike
114
Appointments
115
Breaks
116
Waiting List
117
Templates
118
Customers
119
Providers
120
Resources
121
Services
Code Full Name
Smitj: Smith Joe
Willm: Williams Mike
Set Password
Last Name Williams
First Name Mike
Middle initials
Credentials:
Address 1:
Address 2:
City:
State:
Zip code:
Phones: (941)555-1212 (941)555-1213
Fax: (941)555-1313
E-mail:
URL:
Type: Smith's Fritters
119b

Fig 19.

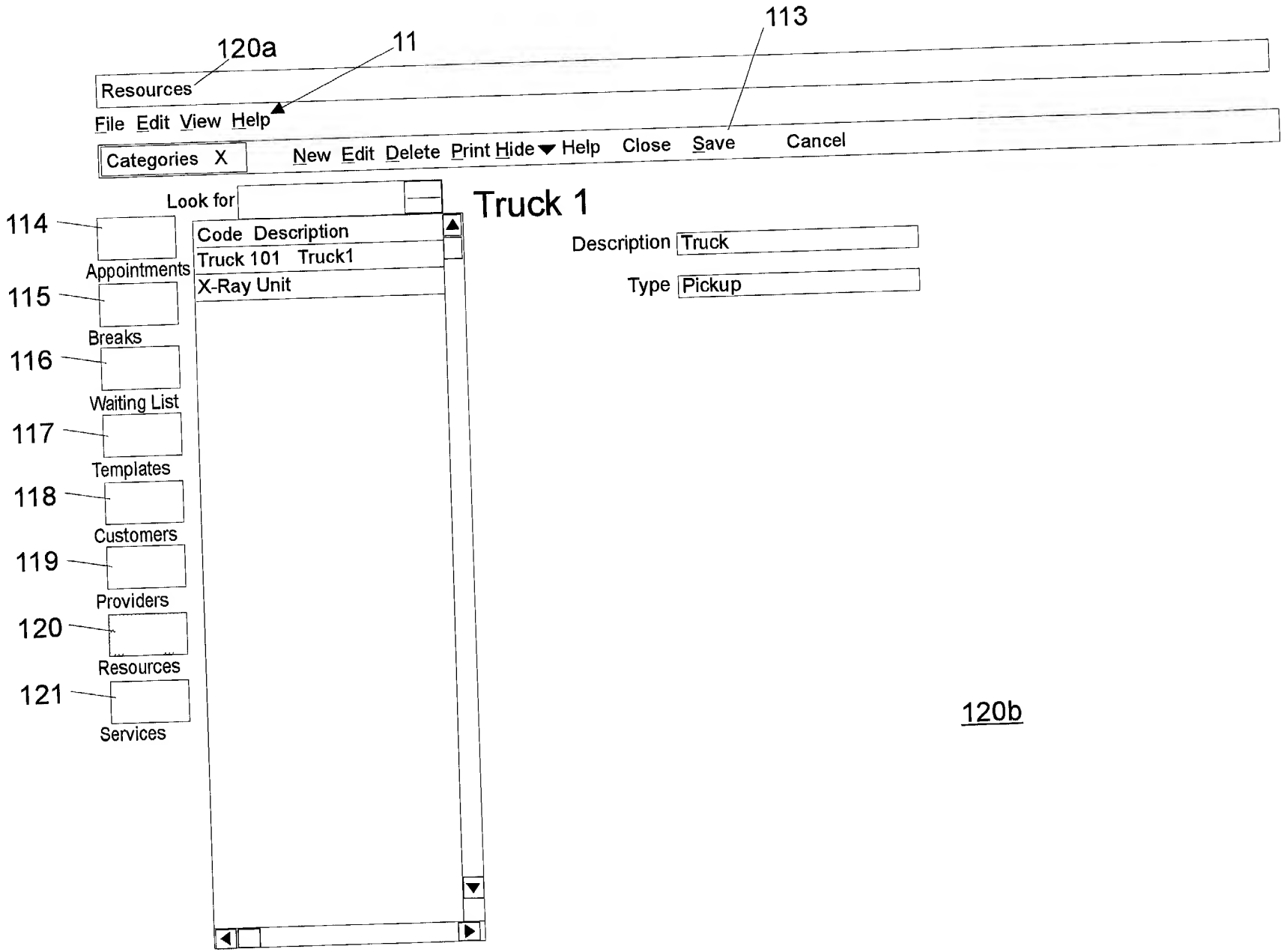
113
120a
11
Resources
File Edit View Help
Categories X
New Edit Delete Print Hide Help Close Save Cancel
Look for
Code Description
Truck 101 Truck1
X-Ray Unit
Truck 1
Description Truck
Type Pickup
114
Appointments
115
Breaks
116
Waiting List
117
Templates
118
Customers
119
Providers
120
Resources
121
Services
120b

Fig 20.

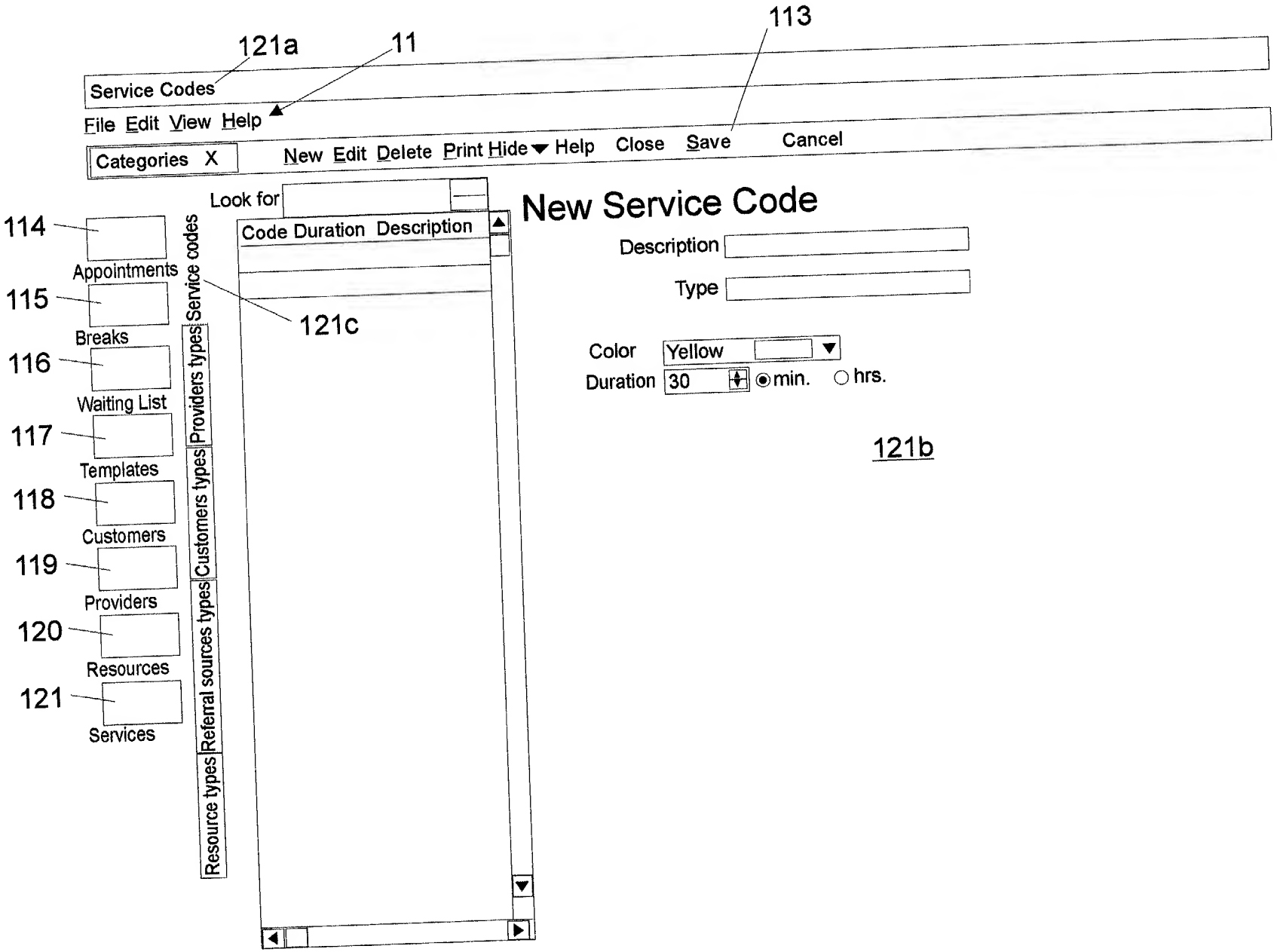
121a
11
113
Service Codes
File Edit View Help
Categories X
New Edit Delete Print Hide Help Close Save Cancel
Look for
Code Duration Description
New Service Code
Description
Type
Color Yellow
Duration 30 min. hrs.
121b
121c
114
Appointments
115
Breaks
116
Waiting List
117
Templates
118
Customers
119
Providers
120
Resources
121
Services
Service codes
Providers types
Customers types
Referral sources types
Resource types

Fig 21.

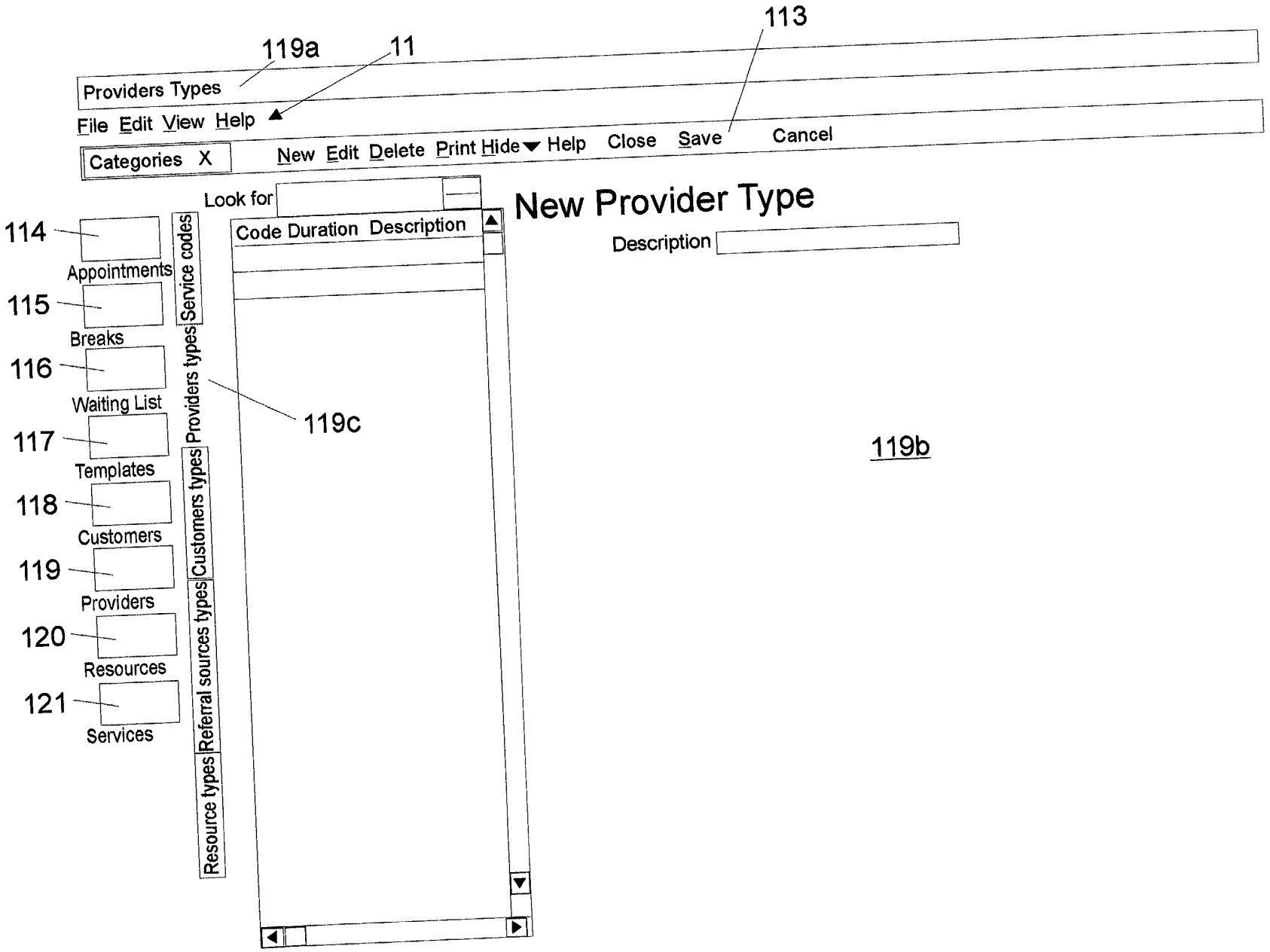
Providers Types
119a
11
113
File Edit View Help
Categories X
New Edit Delete Print Hide Help Close Save Cancel
Look for
Code Duration Description
New Provider Type
Description
114
Appointments
115
Breaks
116
Waiting List
117
Templates
118
Customers
119
Providers
120
Resources
121
Services
Service codes
Providers types
Customers types
Referral sources types
Resource types
119c
119b

Fig 22.

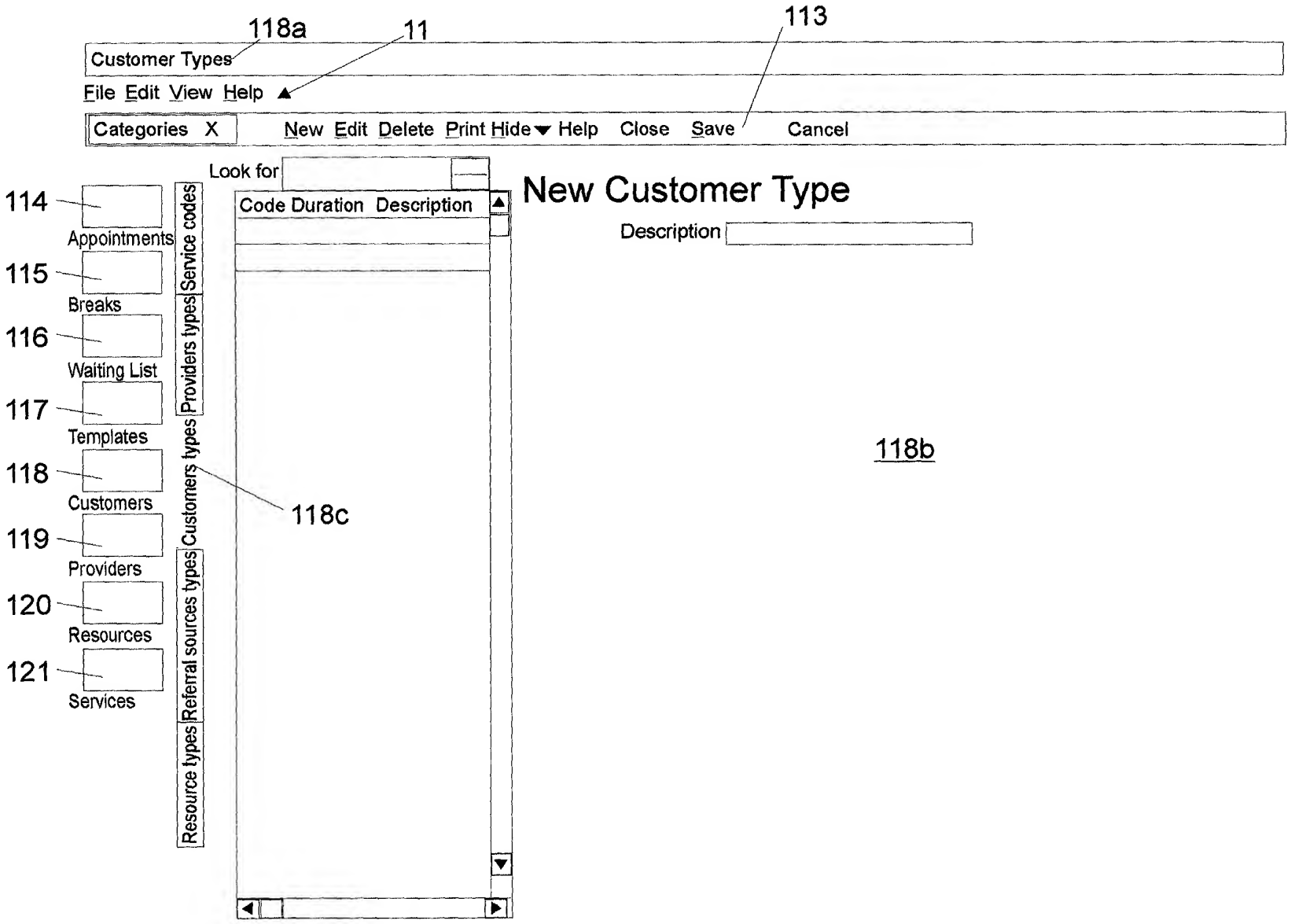
118a
11
113
Customer Types
File Edit View Help
Categories X
New Edit Delete Print Hide Help Close Save Cancel
Look for
Code Duration Description
New Customer Type
Description
114
Appointments
115
Breaks
116
Waiting List
117
Templates
118
Customers
119
Providers
120
Resources
121
Services
Service codes
Providers types
Customers types
Referral sources types
Resource types
118c
118b

Fig 23.

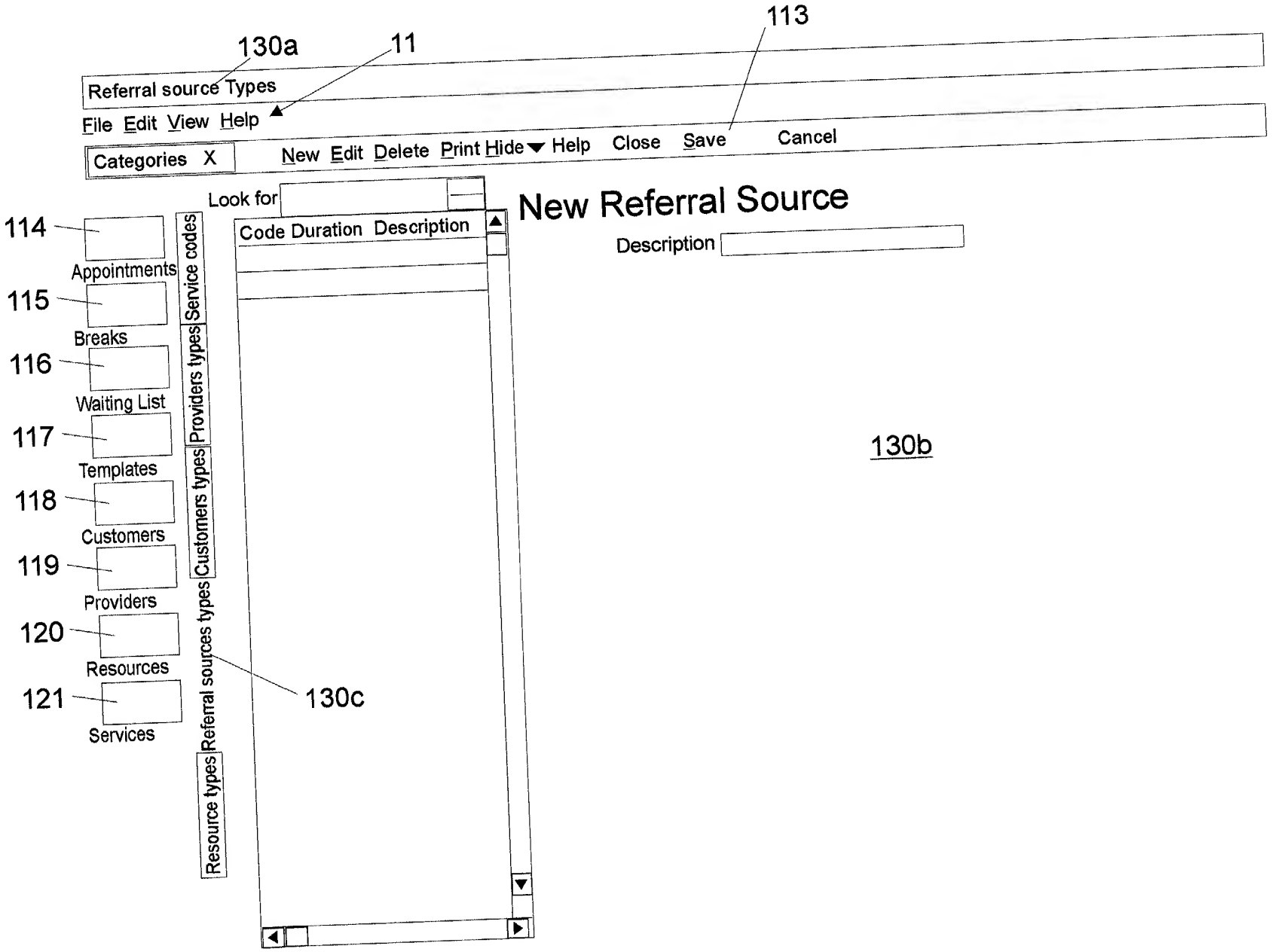
130a
11
113
Referral source Types
File Edit View Help
Categories X
New Edit Delete Print Hide Help Close Save Cancel
Look for
Code Duration Description
New Referral Source
Description
114
Appointments
115
Breaks
116
Waiting List
117
Templates
118
Customers
119
Providers
120
Resources
121
Services
Service codes
Providers types
Customers types
Referral sources types
Resource types
130b
130c

Fig 24.

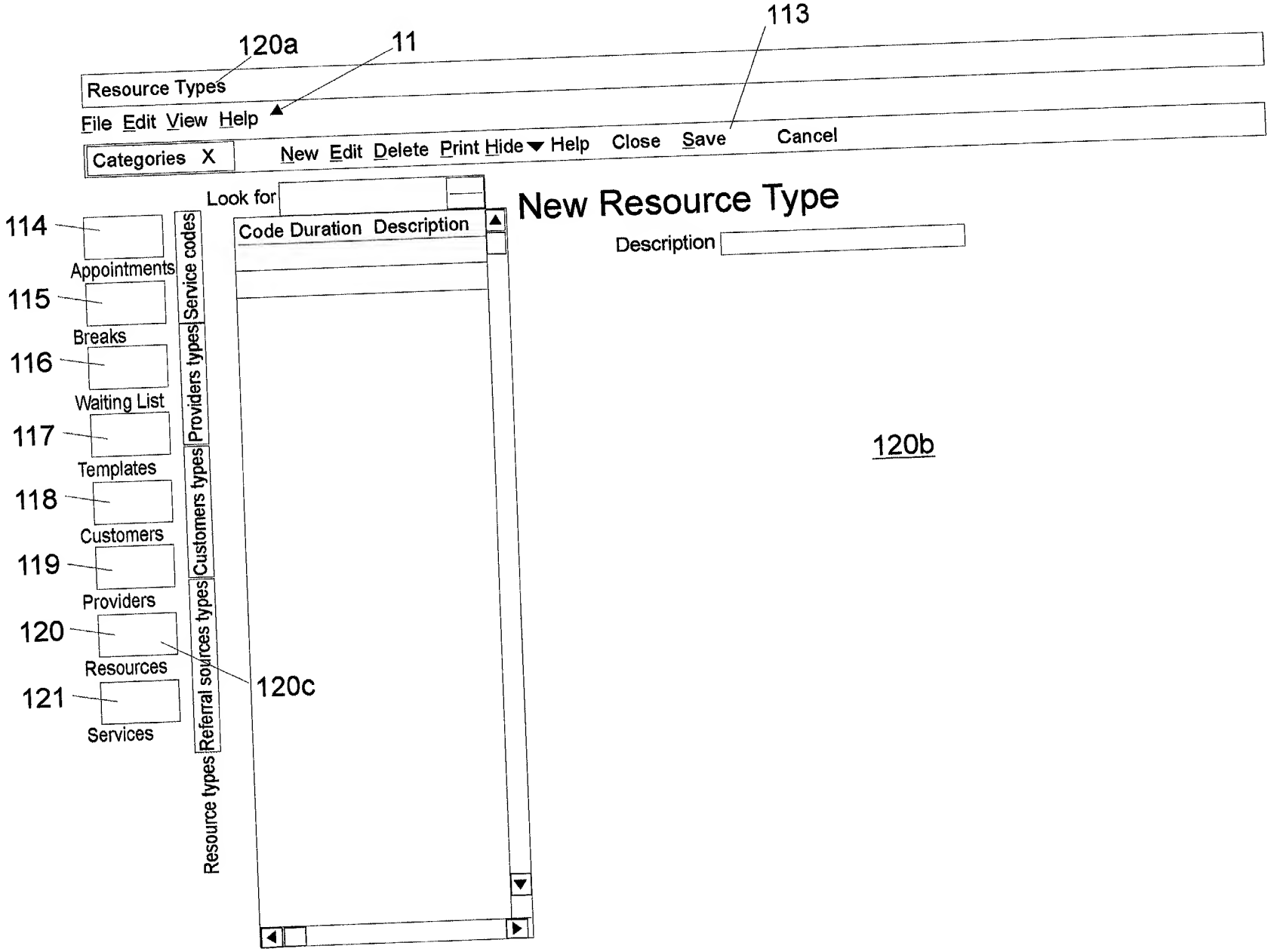
120a
11
113
Resource Types
File Edit View Help
Categories X
New Edit Delete Print Hide Help Close Save Cancel
Look for
Code Duration Description
New Resource Type
Description
114
Appointments
115
Breaks
116
Waiting List
117
Templates
118
Customers
119
Providers
120
Resources
121
Services
Service codes
Providers types
Customers types
Referral sources types
Resource types
120c
120b

Fig 25.

FOR OFFICIAL USE ONLY

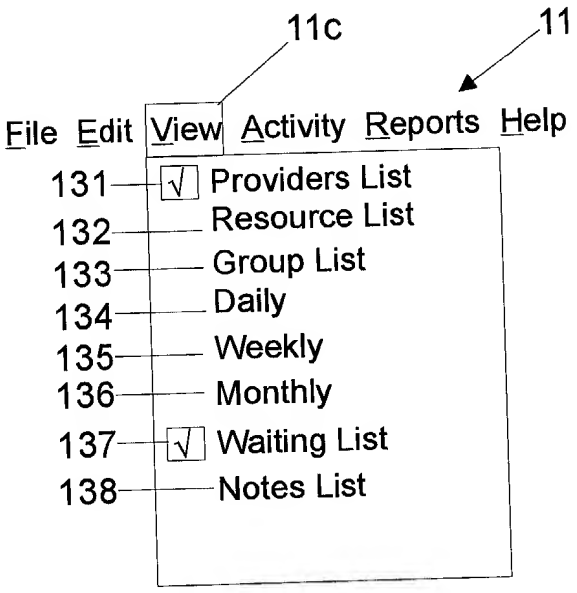

Fig 26.

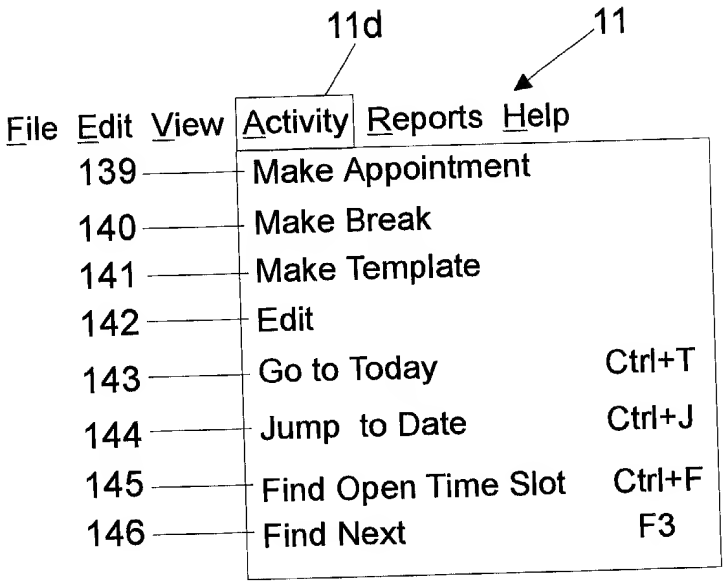

Fig 26a.

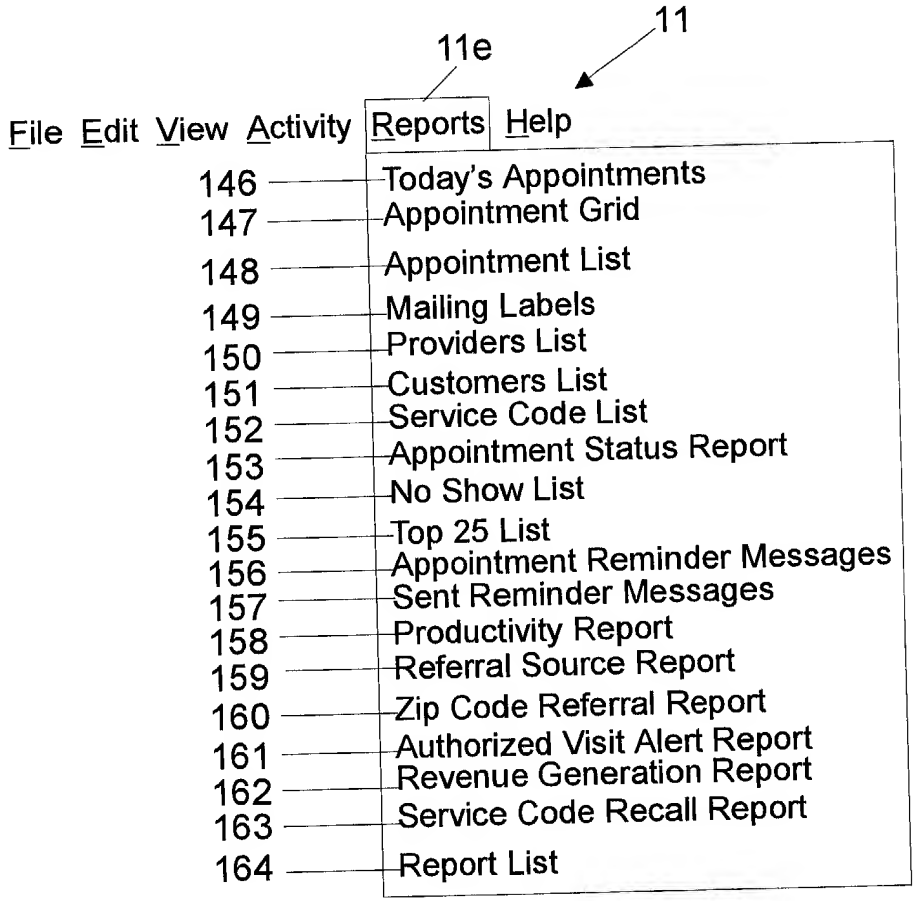
11
11e
File Edit View Activity Reports Help
146 Today's Appointments
147 Appointment Grid
148 Appointment List
149 Mailing Labels
150 Providers List
151 Customers List
152 Service Code List
153 Appointment Status Report
154 No Show List
155 Top 25 List
156 Appointment Reminder Messages
157 Sent Reminder Messages
158 Productivity Report
159 Referral Source Report
160 Zip Code Referral Report
161 Authorized Visit Alert Report
162 Revenue Generation Report
163 Service Code Recall Report
164 Report List

Fig 27.

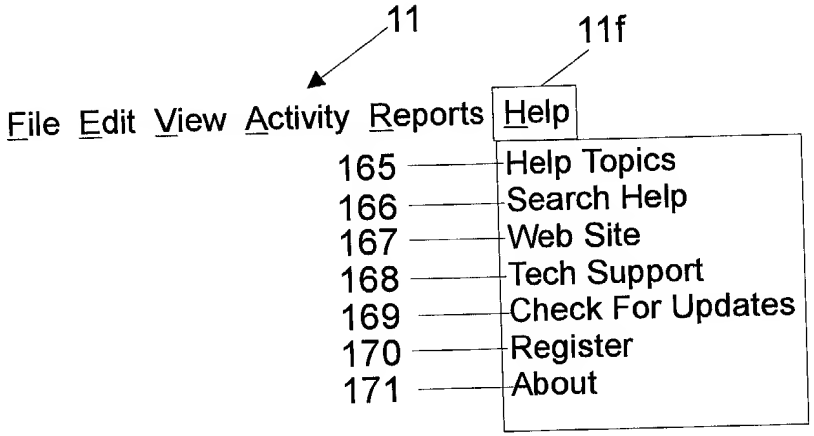
11
11f
File Edit View Activity Reports Help
165
166
167
168
169
170
171
Help Topics
Search Help
Web Site
Tech Support
Check For Updates
Register
About

Fig 28.